1. Online Help . . . 3
1.1 Introduction . . . 5
1.1.1 Conventions . . . 5
1.1.2 Getting Started . . . 6
1.1.2.1 Consumer Website . . . 7
1.1.2.2 Quick Start . . . 7
1.1.2.3 User Interface Tips . . . 8
1.1.3 Manual Overview . . . 8
1.1.4 What's New . . . 9
1.2 Admin . . . 11
1.2.1 My Account . . . 11
1.2.1.1 Settings . . . 12
1.2.1.2 General Info . . . 15
1.2.1.3 Alerts . . . 16
1.2.1.4 MLS Administration . . . 16
1.2.1.4.1 Start MLS Application . . . 17
1.2.1.4.2 Monitor an Application . . . 17
1.2.1.4.3 Cancel an Application . . . 18
1.2.1.4.4 Add Office MLS ID . . . 18
1.2.1.5 Orders . . . 19
1.2.1.6 Billing and Shipping . . . 20
1.2.2 Website . . . 23
1.2.2.1 Titles and Descriptions . . . 24
1.2.2.2 Main Text . . . 24
1.2.2.3 Sell Text . . . 25
1.2.2.4 Career Info Text . . . 25
1.2.2.5 Site Images . . . 25
1.2.2.6 Search Widget . . . 26
1.2.2.7 Communities Served . . . 27
1.2.2.8 Featured Partners . . . 28
1.2.2.9 Listing Address . . . 29
1.2.2.10 Listing Search Areas . . . 29
1.2.2.11 Listing Search Fields . . . 30
1.2.2.12 Consumer Site Theme . . . 30
1.2.3 Email . . . 31
1.2.3.1 Listing Alert Campaign . . . 32
1.2.3.2 Message Templates . . . 33
1.2.3.3 Email-Only Accounts . . . 33
1.2.3.4 Email Signature . . . 34
1.2.3.5 Welcome Email . . . 35
1.2.3.6 Seller Market Report . . . 35
1.2.4 Site Activity . . . 36
1.2.5 Website Analytics . . . 37
1.2.6 Performance Evaluator . . . 37
1.2.7 Testing . . . 38
1.3 Using Market Leader . . . 38
1.3.1 Essentials . . . 38
1.3.1.1 Best Practices . . . 39
1.3.1.1.1 Contact New Contacts . . . 39
1.3.1.1.2 Stay Connected . . . 39
1.3.1.1.3 Get Organized . . . 40
1.3.1.1.4 Advertise Your Site . . . 40
1.3.1.2 Agent Dashboard . . . 41
1.3.1.3 My Inbox . . . 42
1.3.1.3.1 Messages . . . 42
1.3.1.3.2 Reminders . . . 43
1.3.1.3.3 Webmail . . . 44
1.3.1.4 Contacts . . . 45
1.3.1.4.1 Status . . . 50
1.3.1.4.2 Recent Activity . . . 52
1.3.1.4.3 Initial Contact Wizard (ICW) . . . 53
1.3.1.4.4 Contact . . . 54
1.3.1.4.5 Contact Summary . . . 54
1.3.1.4.6 Contact Listings . . . 63
1.3.1.4.7 Contact History . . . 66
1.3.1.4.8 Contact Email . . . 66
1.3.1.4.9 First Call - Agents . . . 68
1.3.1.4.10 Finding and Adding Contacts . . . 68
1.3.1.4.11 Manage Groups . . . 70
1.3.1.4.12 Import Contacts . . . 71
1.3.1.4.13 Export Contacts . . . 72
1.3.1.4.14 Export Messages . . . 73
1.3.1.4.15 Unsubscribe Contact . . . 73
1.3.1.5 Tools for the Seller . . . 74
1.3.1.5.1 Market Status Report . . . 74

1.3.1.5.2 Send Seller's Market Report . . . 75
1.3.1.6 Manage Listings . . . 77
1.3.1.6.1 Email a Listing . . . 78
1.3.1.6.2 Post on Craigslist . . . 79
1.3.1.6.3 Single Property Websites . . . 81
1.3.1.7 Search MLS . . . 83
1.3.1.7.1 Listing Details . . . 84
1.3.1.8 Marketing . . . 85
1.3.1.8.1 Marketing Materials . . . 85
1.3.1.8.2 Campaigns . . . 135
1.3.1.8.3 File Manager . . . 141
1.3.1.8.4 System Requirements - Marketing . . . 143
1.3.1.9 Cell Phone Access to Market Leader . . . 145
1.3.1.10 Mobile Email . . . 145
1.3.1.10.1 Android . . . 146
1.3.1.10.2 iPhone . . . 147
1.3.1.10.3 Outlook 2007 . . . 148
1.3.1.11 Give us your feedback . . . 149
1.3.1.12 Reporting . . . 150
1.3.2 For Business Suite & Professional . . . 150
1.3.2.1 Best Practices - Broker . . . 150
1.3.2.1.1 Add Agents . . . 150
1.3.2.1.2 Pluralizing Team Emails . . . 150
1.3.2.1.3 Craigslist Strategy . . . 150
1.3.2.1.4 Participate in the Referral Network . . . 151
1.3.2.1.5 Set Agent Expectations . . . 151
1.3.2.1.6 Monitor Agents . . . 151
1.3.2.1.7 First Call Follow-up . . . 151
1.3.2.2 Broker Dashboard . . . 151
1.3.2.3 Waiting Messages . . . 152
1.3.2.4 Call Center . . . 153
1.3.2.5 Agents . . . 153
1.3.2.5.1 Agent Profile . . . 153
1.3.2.5.2 Add an Agent . . . 154
1.3.2.5.3 Edit Agent Profile . . . 155
1.3.2.5.4 Delete Agent . . . 155
1.3.2.5.5 Email Agents . . . 156
1.3.2.5.6 Agents View Description . . . 156
1.3.2.5.7 Performance Evaluator - Agent . . . 157
1.3.2.5.8 Automatic Performance Notification . . . 158
1.3.2.6 Email Only Accounts . . . 158
1.3.2.7 Mortgage Lender . . . 159
1.3.2.8 Referrals . . . 160
1.3.3 For Lenders . . . 161
1.3.3.1 Best Practices - Lender . . . 161
1.3.3.1.1 Build Relationships . . . 161
1.3.3.1.2 Contact New Contacts ASAP . . . 161
1.3.3.1.3 Pre-approval Requests . . . 162
1.3.3.1.4 Share Lender Comments . . . 162
1.3.3.1.5 Welcome Email URL . . . 162
1.3.3.2 Alerts - Lender . . . 162
1.3.3.3 Contacts - Lender . . . 163
1.3.3.3.1 Contact Status - Lender . . . 163
1.3.3.3.2 Contact Summary - Lender . . . 164
1.3.3.3.3 Contact Listings - Lender . . . 168
1.3.3.3.4 Share Comments . . . 168
1.3.3.4 Reminders - Lender . . . 169
1.3.3.5 Admin - Lender . . . 169
1.3.4 Icons . . . 170
1.4 Training and Support . . . 172
1.4.1 FAQ . . . 172
1.4.2 Training . . . 173

Online Help

Table of Contents

- Introduction
  - Conventions
  - Getting Started
    - Consumer Website
    - Quick Start
    - User Interface Tips
  - Manual Overview
  - What's New
- Admin
  - My Account
    - Settings
    - General Info
    - Alerts
    - MLS Administration
      - Start MLS Application
      - Monitor an Application
      - Cancel an Application
      - Add Office MLS ID
    - Orders
    - Billing and Shipping
  - Website
    - Titles and Descriptions
    - Main Text
    - Sell Text
    - Career Info Text
    - Site Images
    - Search Widget
    - Communities Served
    - Featured Partners
    - Listing Address
    - Listing Search Areas
    - Listing Search Fields
    - Consumer Site Theme
  - Email
    - Listing Alert Campaign
    - Message Templates
    - Email-Only Accounts
    - Email Signature
    - Welcome Email
    - Seller Market Report
  - Site Activity
  - Website Analytics
  - Performance Evaluator
  - Testing
- Using Market Leader
  - Essentials
    - Best Practices
      - Contact New Contacts
      - Stay Connected
      - Get Organized
      - Advertise Your Site
    - Agent Dashboard
    - My Inbox
      - Messages
      - Reminders
      - Webmail
    - Contacts
      - Status
        - Built-in Status Type - Agent
        - Custom Status Type - Agent
      - Recent Activity
      - Initial Contact Wizard (ICW)
      - Contact
      - Contact Summary
        - Summary Fields
        - Summary Actions
        - Summary Comments

        - Summary Emails
        - Summary Market Insider
        - Summary Buyer Requests
    - Contact Listings
        - Add New Listing Alert
        - Send Listings
    - Contact History
    - Contact Email
        - Compose Message
        - Reply to Email Message
    - First Call - Agents
    - Finding and Adding Contacts
    - Manage Groups
    - Import Contacts
    - Export Contacts
    - Export Messages
    - Unsubscribe Contact
- Tools for the Seller
    - Market Status Report
    - Send Seller's Market Report
- Manage Listings
    - Email a Listing
    - Post on Craigslist
        - Craigslist Guidelines
    - Single Property Websites
- Search MLS
    - Listing Details
- Marketing
    - Marketing Materials
        - Marketing Materials Selections
            - Select a Marketing Piece
            - Search for Marketing Materials
            - Sort Marketing Materials and Saved Pieces
            - Find Saved Pieces
            - Find Available Sizes
        - Marketing Materials Editor
            - Editing Text
            - Editing Images
            - Text management tools
            - Map Editing
            - Shape Editing
            - Changing Views
            - Preview a Marketing Piece
            - Page Controls
        - Marketing Materials Actions
            - Preview a Piece
            - Edit a Piece
            - Print a Piece
            - Order Professional Printing
                - Print FAQ
                - Print Pricing
                - Terms and Conditions
            - Email a Piece
                - Add Sender to Safe List
            - Post to Website or Blog
            - Post to Social Network
                - Post to Facebook
                - Post to Twitter
            - Add to Campaign
        - Marketing in Motion
            - Selecting a Template to Edit
            - Create or Edit Preview
            - Marketing In Motion Editor
                - Edit Action Buttons
                - Editor Panes
                - Working with Saved Templates
    - Campaigns
        - Build a New Campaign - Basic
        - Build a New Campaign - Advanced
        - Build Your Own Campaign
        - View Transactions and Manage Prepaid Accounts
        - Edit Existing Campaigns
    - File Manager
    - System Requirements - Marketing
        - Change Browser Settings to allow Pop-Ups

- Install Adobe Flash Player
- Install Adobe Reader or Adobe Acrobat
- Install Microsoft Silverlight
- Minimum Screen Resolution
- Cell Phone Access to Market Leader
- Mobile Email
  - Android
  - iPhone
  - Outlook 2007
- Give us your feedback
- Reporting
- For Business Suite & Professional
  - Best Practices - Broker
    - Add Agents
    - Pluralizing Team Emails
    - Craigslist Strategy
    - Participate in the Referral Network
    - Set Agent Expectations
    - Monitor Agents
    - First Call Follow-up
  - Broker Dashboard
  - Waiting Messages
  - Call Center
  - Agents
    - Agent Profile
    - Add an Agent
    - Edit Agent Profile
    - Delete Agent
    - Email Agents
    - Agents View Description
    - Performance Evaluator - Agent
    - Automatic Performance Notification
  - Email Only Accounts
  - Mortgage Lender
  - Referrals
- For Lenders
  - Best Practices - Lender
    - Build Relationships
    - Contact New Contacts ASAP
    - Pre-approval Requests
    - Share Lender Comments
    - Welcome Email URL
  - Alerts - Lender
  - Contacts - Lender
    - Contact Status - Lender
      - Built-in Status Type - Lender
      - Custom Status Type - Lender
    - Contact Summary - Lender
      - Summary Description - Lender
      - Summary Actions - Lender
    - Contact Listings - Lender
    - Share Comments
  - Reminders - Lender
  - Admin - Lender
- Icons
- Training and Support
  - FAQ
  - Training

Introduction

Introduction

Welcome to your new tool for success in your real estate business! This Internet-based system brings potential customers (also called "contacts") to your website and then provides you with tools to organize, target, and market to each customer. Market Leader consists of two parts: the front end (consumer) website and the back end (CRM) management tool that you work with. The consumer website is what anonymous visitors and contacts visit to search for homes for sale listed in your MLS. When anonymous visitors sign up to view listings, they become contacts. You log into the Market Leader CRM to manage and communicate with contacts.

Conventions

Conventions

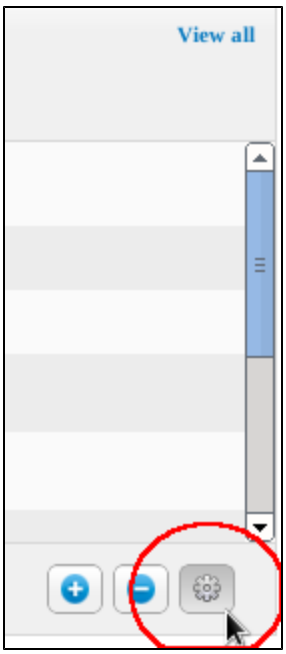
This topic explains the conventions used throughout this online help system.

Navigation List

In order to access a specific view of the market leader **Admin** user interface, most procedures tell you to click in the navigation list (e.g. **Inbox**). The navigation list refers to the list of items in the horizontal menu bar that enable you to switch between the various views. The following graphic shows the navigation list for Market Leader Professional. Depending on the product you use and your role, your navigation list might look different.

Configure Columns

All grids include a column filter which you can use to show and hide columns in each grid. To show and hide columns, click Configure Columns in a grid. Check columns to show. Un-check columns to hide.



Log Out

To log out of the Market Leader **Admin** panel, click the **Logout** link in the banner of the web page.

Panel

The term panel is used to refer to a section of the user interface that contains a specific class of information (e.g. a list of links, a widget, nearby listings, nearby schools, monthly payments, and so on). A panel usually has a border or a different background color to separate it from the main content of the page. Panels often contain information ancillary to the main content and arrayed alongside (i.e. sidebar) the main content. You can also refer to the main content area as the main content panel.

Getting Started

Getting Started

The Getting Started section provides help to new users for the following.

- An introduction to the Consumer Website.
- A Quick Start summary for a minimal setup.
- A collection of User Interface Tips that describe common patterns and features of the Market Leader user interface.

Consumer Website

Consumer Website

Using a computer with an internet connection, you can access the consumer website by entering your domain name, such as MyDomainName.com, into the address bar of a web browser. The **Home** page appears as the landing page for your domain. Take a moment to peruse the **Home** page.

Optionally, you can access your website on the Admin > My Account > General Info tab of Market Leader. In the General Info section, click **View your website**.

The website uses a layout with the following elements.

- A header that includes an agency logo, navigational tabs, and account links. The header content is consistent across all pages on the site. You can select an agency logo to display in the header.
- A body that typically includes multiple columns of content including text and images (e.g. website image and site banner). The body content depends on the page being viewed. Most pages contain text and your contact information both of which you can modify using Admin > Website tools.
- A footer that includes site navigation links, contact, additional, and legal info. The footer content is consistent across all pages on the site. The contact and additional info are configurable using Admin > Website tools.

The following graphics illustrate consumer website pages. The highlights indicate areas of the user interface that you can configure. Some configurable elements, such as contact and additional info, are repeated throughout the website. Repeated elements might have different locations depending on which page you are viewing. For more information on configuring the consumer website, see Admin.

Navigation Tabs

The header includes navigation tabs that direct the visitor to different pages of the website depending on their specific interest. Depending on your Market Leader subscription, the navigation tabs include some variation of the following.

- Buy - for visitors that want to search your MLS or configured search areas.
- Sell - for visitors that want advice on selling their home.
- Market Insider - for visitors looking for background information on your area.
- Meet or About - for visitors that want to learn more about you.
- Contact - an email form for a visitor to send a message to you.
- My Tools - for visitors that want to access additional site functions by signing up, also known as becoming a Contact.

Quick Start

Quick Start

Market Leader provides the following PDF files, by product, that describe the minimum requirements to start using the system.

- Essentials - Getting Started Guide
- Professional - Getting Started Guide
- Business Suite - Getting Started Guide

User Interface Tips

User Interface Tips

This article contains tips for using the **Online Help** wiki and Market Leader interfaces.

How to Print Online Help Content | HTML WYSIWYG Editor

How to Print Online Help Content

- To print a single page
    1. Click the print view button
    2. Use the browser's **Print** option

HTML WYSIWYG Editor

Market Leader provides a HTML WYSIWYG editor in the Compose Message and Reply to Email Message forms as well as the Admin Website text area inputs (e.g. Sell Text input among others). WYSIWYG is an acronym that stands for "What you see is what you get." An HTML WYSIWYG editor enables you to compose HTML formatted text without having to edit HTML markup—all those nasty looking angle-bracketed tags. If you know how to use a modern word processor application, the HTML WYSIWYG editor should look and feel familiar to you.

The Market Leader HTML WYSIWYG editor supports the following format options.

- Paragraph styles
- Font family and size
- Bold, italic, and underlined text
- Bullet and Number lists
- Indent and Outdent
- Undo and Redo
- Text and Background Color
- Hyperlinks
- Images

  ⚠ Images you insert must be hosted on a domain separate from your Market Leader domain.
- Horizontal rules
- Custom characters
- Emoticons
- Spell check
- HTML source editing

Manual Overview

Manual Overview

The Market Leader User Manual provides information to help you customize your website and use the contact management system. The manual includes the following sections.

Introduction	To orient you to the system and this manual.
Setup	To help you prepare for first use and customize the system to your specific need.
Using Market Leader	To help you get the most out of the system's features.
Training and Support	To assist you with additional learning and problem-solving resources.

⚠ This manual covers all features for all of the Market Leader products. Depending on your role and the package you purchased, some features described or content in this manual might not apply to your situation.

For details regarding problems, technical issues, or other questions not answered in this manual, you can find additional information by visiting the online Support link or contacting Customer Support as listed in the Market Leader **Admin** user interface.

To log in to your Market Leader account

1. Go to your consumer website (i.e. your-market-leader-domain.com).
2. Scroll to the bottom of the page.
3. Click **Admin Login**.
4. In the **Login** form, enter your Market Leader credentials.
5. Click **Login**.

Download PDF

You can download a PDF version of the entire online help contents from the following link.

Download Manual in PDF format

What's New

What's New

The **What's New** topic lists features released in Market Leader products dating back to February 2011. The features are in date order, most recent first.

October 2012

- Users can add more than 2 social media links that are automatically included on marketing email, including the following
    - ActiveRain
    - Blogger
    - Google+
    - Digg
    - Facebook
    - Flickr
    - LinkedIn
    - MySpace
    - Pinterest
    - reddit
    - Other Blog
    - Twitter
    - WordPress
    - YouTube
- The email compose forms (one-off and marketing email) support adding an image into an email body. Using an Image Insert icon, a user can upload an image to File Manager and select to include it in an email.
- Users can select which columns display for grids throughout the system. This helps users with smaller screens to see only the information they want.
- Contact Summary contains a new free-form text field that enables agents to apply a searchable category to a contact.
- Advanced Search includes Category and Source fields.
    - Source field auto-completes on existing Source types. Start typing a source name and the tool suggests a completion.
- Recently Active shortcut added back to Contacts menu.
- Modified Advanced Search Campaign setting to behave such that "Yes" returns users currently on active campaigns, instead of if they were ever on a campaign.
- Entered/Imported contacts removed from the Referral network.
- Prioritize bulk emails over Campaigns. This improves perceived email delivery, as someone sending a one-off email expects immediate delivery, whereas a campaign email expectation is 24 hours.

- Admin > My Account tab placement moved to beginning of section.
- General Info, Alerts and MLS Administration moved from Website to My Account tab.
- Franchise field added to CRM > General Info for some products.
- Listing Alert Campaign – addressed formatting issue where content showed in two columns in Outlook.
- Limit maximum number of imported contacts to 15,000--lifetime. Per file import limit changed to 5,000.
- Enforce unique logins for Vision users.
- Remove auto-login links in emails to CRM contacts.

August 2012

- Sellers' Market Report enhancements

June 2012

- New contact types
- New contact fields for seller data
- Advanced search criteria
- Market Insider subscription management
- Prospect terminology changed to Contact

May 2012

- Profile alert when contact provides phone contact information.
- Marketing Center

April 2012

- My Account (credit card management)
- Community Content (custom content)
- New contact and profile fields

December 2011

- Agent Dashboard Visistat® Widget
- Website Analytics (not available on eEdge accounts)

November 2011

- New Navigation List
- Enhanced MLS Search
- Configurable Welcome Email
- Configurable School Info
- New option for Seller's Market Report

September 2011

- Search Widget Choices

August 2011

- Consumer Site Theme

July 2011

- Consumer website Market Insider tab.
- Market Insider section on Contact Summary view.

June 2011

- Updated Reminders feature (Agent Dashboard)
- HTML email

May 2011

- MLS Administration
- Additional fields in Contact Summary

February 2011

- Search by Map (Consumer site & CRM) - Allow consumers & agents to search for listings using an interactive map
- Price search using user-entered values - Allow user to enter price range to better match search to their needs
- Clear indication of Listing Type - Foreclosure, Short Sale, Auction, Rental
- Enhanced Listing Detail Page - School Info, Nearby Listings, Market Trends
- Share Listing on Facebook
- Additional homes & links on Home & Community pages
- List Usability Enhancements - Back to List maintains sorting/filters, Adjustable list height

Admin

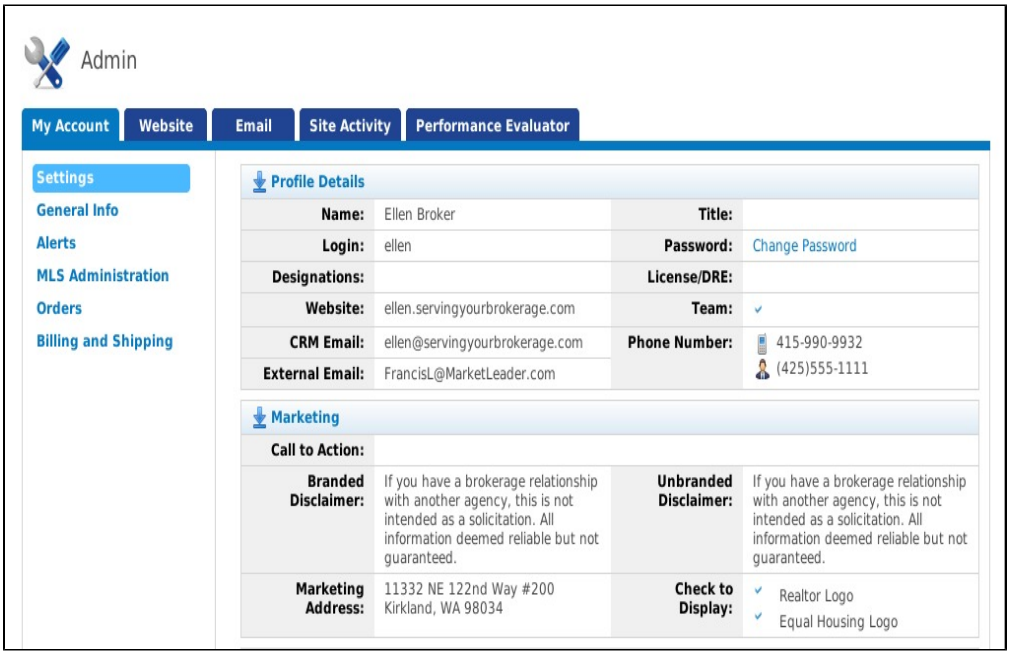
Admin

Admin tools enable you to configure and customize the Market Leader system to work the way you want. This section describes **Admin** tools in more detail. Specifically, it covers the following.

- How to change your profile information
- How to configure and customize a consumer website.
- How to manage automated email content.
- How to analyze website and agent performance.
- How to manage orders and billing.

When logged into Market Leader, you see an **Admin** link in the navigation list. Clicking the **Admin** link displays the **Admin** tools which include the following.

- My Account
- Website
- Email
- Site Activity
- Website Analytics
- Performance Evaluator

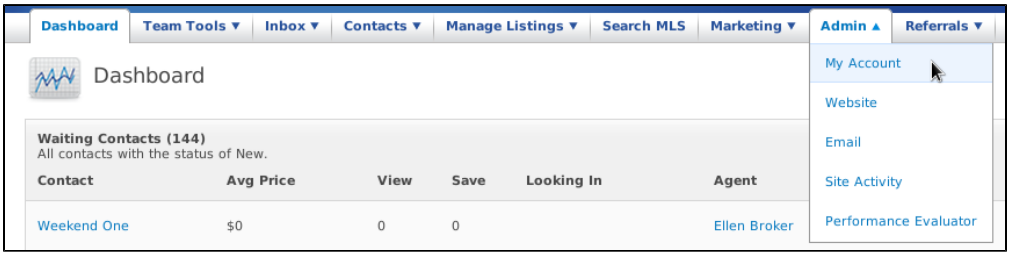


My Account

My Account

My Account tools enable you to maintain the following vital information.

- Profile details
- Marketing information
- Additional Info, Bio, and Awards
- Agent MLS ID
- Profile Images, Logo, and Bulk Mail Permit



Access My Account Tool

The following procedure assumes you are logged into the market leader Admin interface.

1. In the navigation list, hover the pointer on Admin.
2. Click My Account.
   A Settings view opens on the **My Account** tab.

For more information, refer to the following.

Settings

Orders

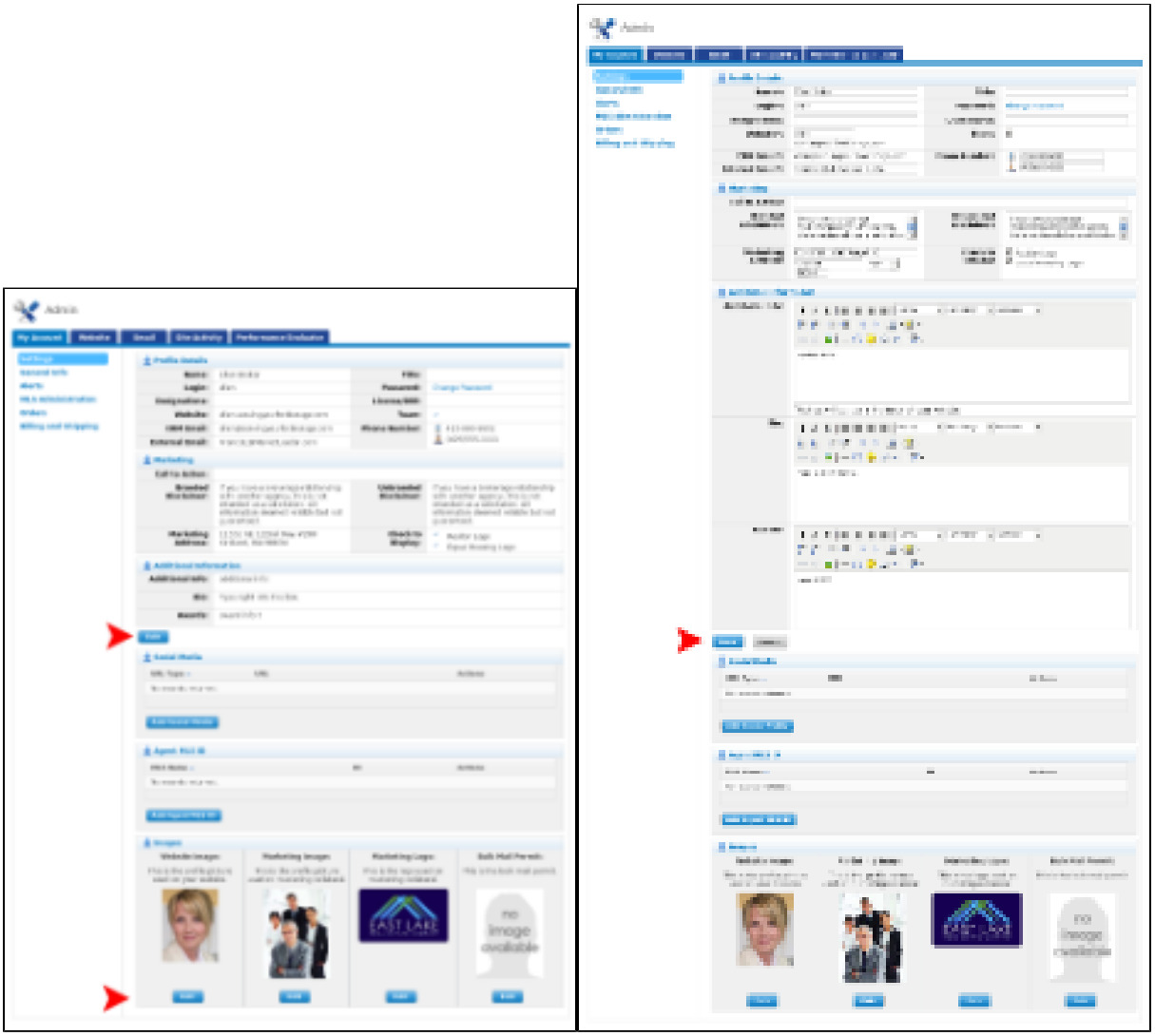
Billing and Shipping

Settings

Settings

The **Settings** tool enables you to maintain profile and marketing settings used by Market Leader in various parts of the system. The initial Settings view is read-only. When you click **Edit**, the view changes to a form in which you can edit certain values. Editable values vary depending on your subscription order type. The tool divides the user interface into the following sections.

- Profile Details
- Marketing
- Additional Information
- Social Media
- Agent MLS ID
- Images



The following procedures assume you are already logged into the market leader Admin interface.

Access Settings

1. In the navigation list, click Admin.
2. Click My Account.
   The My Account tool opens on **Settings** by default.

Maintain Profile, Marketing, and Additional Information

1. Click **Edit**.
2. Make changes to any of the fields.
3. Click **Save** or **Cancel** to save or discard changes, respectively.

Read-only Information Fields

The read-write form might include additional read-only fields that are for information purposes such as **In Rotation**, **Account Access**, and **Meet Page**. To edit these fields, visit an Agent Profile.

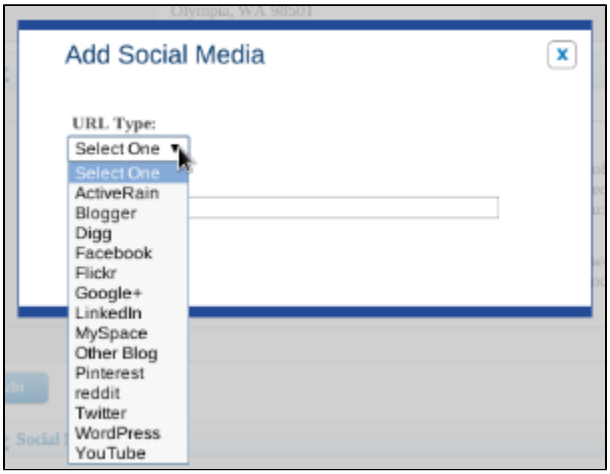
Social Media

The **Social Media** panel includes fields to configure links to social networks. Marketing Emails use these links in a standard footer. The system renders the link as a logo for the network type you select. A social networking link requires two settings: network type and URL.

> ⚠ If you do not select a network type corresponding to a URL, when a customer views a marketing email, the link is not visible.

To select network type

1. In the **Settings** view, click **Add Social Media**.
   The Add Social Media form displays.
2. In the form, paste a social network URL into a **URL** field.
3. In the drop-down control associated with the URL, select a network type.
4. Click Save.



Agent MLS ID

market leader uses agent MLS ID to populate listings in Manage Listings view and Post on Craigslist forms. To include listings for an agent on the site, use the following procedure.

1. Click **Add Agent MLS ID**.
   The tool pops open an **Add MLS** form.
2. Select an **MLS**.
3. In **Agent MLS ID**, enter an MLS ID.
4. Click **Save** or **Cancel** to save or discard changes, respectively.
   The tool closes the form and returns you to **Settings**.

Images

The **Settings** tool supports uploading images for use on a Consumer Website, in Marketing Materials, and for a bulk mailing permit. To upload an image, use the following procedure. Before starting the procedure, verify that the image meets the following guidelines.

Image Type	Guideline

Website Image	File format: jpg Maximum size: 8MB Aspect ratio: 100 **:** 130 (W **:** H)
Marketing Image	File format: jpg or png Maximum width: 2800 pixels
Marketing Logo	File format: jpg or png Maximum width: 2800 pixels
Bulk Mail Permit	File format: jpg or png Maximum width: 2800 pixels

The system appropriately scales images to the size required by a given context. In general, scaling down does not sacrifice image quality, whereas scaling up might degrade image quality.

1. In **Images**, click **Edit** corresponding to the image you want to upload.
   The view changes to a form that you can edit.
2. Click **Browse**.
   The tool opens a standard **Open File** dialog.
3. In the dialog, navigate to the image you want to upload.
4. Click **Open**.
5. Click **Upload**.
6. The tool closes the form and displays the newly uploaded image.

General Info

General Info

On the My Account tab, Market Leader includes a **General Info** view. The **General Info** view enables you to change the following settings.

- Company name
- Address
- Phone numbers
- Franchise
- Notes
- MLS IDs
- Time zone

To Change General Info

This procedure assumes you are already logged into the Market Leader **Admin**user interface.

1. In the navigation list, click **Admin**.
2. In the **General Info** view, click the **Edit** button.

   The view changes to an editable form.
3. On the editable form, make your changes.

   The editable form provides a link to add an MLS ID for your office. To change agent MLS IDs, use the My Account tool. To add an office MLS ID use the following procedure.
   a. Click the **Add Office MLS ID** link.
   b. On the **Add Office MLS ID** form, provide appropriate values.
   c. Click the **Save** button.
4. When you are finished making changes to **General Info**, click the **Save** button.

See Also

- Admin

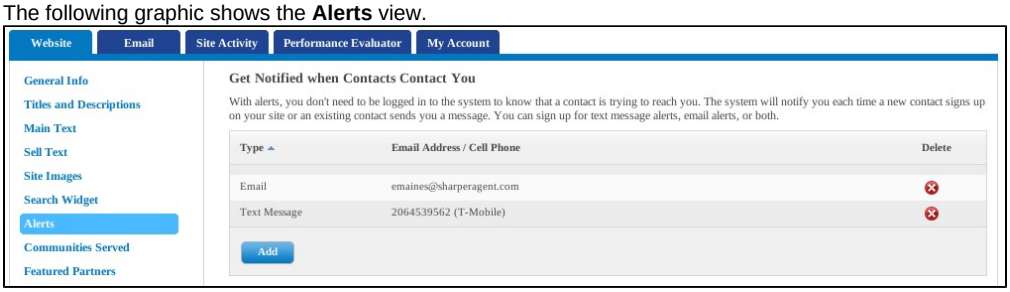
- Website
- Conventions
- Manual Overview
- My Account

Alerts

Alerts

The **Alerts** view enables you to manage notifications of **Contact** activity in the Market Leader system.

The following graphic shows the **Alerts** view.



You receive notifications for the following events.

- A new contact signs up on your website.
- A contact clicks Request More Information when viewing a listing.
- A contact clicks Request a Visit when viewing a listing.
- A contact sends you an email.
- A contact is transferred to you by another agent.
- Your lender updates comments on a contact record (if working with a lender).

  If you are a **First Call** user, then a new contact alert indicates whether the call center will be calling this contact.

To Manage Alerts

This procedure assumes you are already logged into the Market Leader **Admin**user interface.

1. In the navigation list, click **Admin**.
2. On the **Website** tab, click **Alerts**.

   The view shows a list of the currently configured **Alerts**. You can delete an **Alert** by clicking the **Delete** icon ( ).
3. To add a new alert, click the **Add** button.

   If the text fields in the **Add Alert** pop-up form are disabled, that means you have already specified the maximum of three (3) alerts.
4. Fill in the **Add Alerts** form.

   You can enter either an email address, a cell phone number, or both.
5. Click the **Add** button.

MLS Administration

MLS Administration

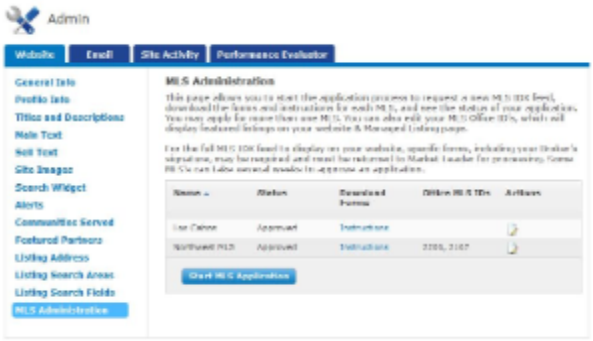
This topic describes the **MLS Administration** view found in the Market Leader **Admin** interface. The **MLS Administration** view enables you to manage MLS IDX feeds for your website. In this view, you can perform the following tasks.

- Request approval for an MLS IDX feed.
- Download instructions and required forms to gain approval for an IDX feed.
- Monitor an IDX feed approval process.
- Associate office MLS IDs with your website.
- Cancel an approval request (limited).

For more information, see the following topics.

- Start MLS Application
- Monitor an Application
- Cancel an Application
- Add Office MLS ID

The following graphic shows the **MLS Administration** view. To enlarge the image, click the thumbnail.



Start MLS Application

Start MLS Application

To request approval for an MLS IDX feed on your website, use the following procedure. This procedure assumes you are already logged into the Market Leader **Admin** user interface.

1. In the navigation list, click Admin.
2. Click **MLS Administration**.
3. Click **Start MLS Application**.

   The system displays a **Start MLS Application** dialog. The dialog includes instructions and a drop-down list of known MLS feeds for your area. You can view alternate names for a feed by selecting it. You can change selections as many times as you want, before you click **Save**

4. From the **Select the MLS** drop-down list, select a feed.
5. If you found a feed in the previous step, you can skip this step. Otherwise, if the feed you want is not in the list, select **Other**.

   The system expands the dialog to provide a text box field. Before entering a name for a new feed, please verify that you are not looking for an alternate name of an existing feed.
   a. Write in the name of an MLS that is not in the list.
   b. Wait for Market Leader to contact you to discuss your request.
6. Click **Save**.
7. In the **MLS Administration** view, click **Instructions**.

   The system opens the instructions in a new window.

8. Follow all steps described on the instruction page for the MLS you selected.

To add additional MLS feeds, repeat this procedure.

Monitor an Application

Monitor MLS Application

The **MLS Administration** view includes a column for monitoring status of an application. Depending on the MLS, your application might require actions by multiple parties including you, Market Leader , and an MLS IDX feed provider. As an application progresses, the **MLS Administration** view updates the **Status** of the application. The following table describes the **Status** values you might encounter during an approval process.

Status Level	Description
Agent: Review Instructions	You must download all required forms, complete and send them to Market Leader according to instructions. This status level begins when you start a new application for MLS approval and remains in effect until Market Leader confirms receipt of all required forms.
In Review	Market Leader has confirmed receipt of all required forms and is reviewing them. Forms are reviewed in the order received.
Agent: Resend forms	Market Leader found unresolved issues or questions about an application form and has asked you to resolve the issues and resend the form.

Sent to MLS	The forms are correctly completed and Market Leader submitted them to the MLS. MLS boards can take from 1 - 6 weeks or more to respond.
Agent: Fix MLS issue	Market Leader requested you to resolve issues raised by an MLS board (e.g. membership dues, name change, etc.)
Approved	MLS has approved an application and an MLS IDX feed is live on your website.
Deactivated	An MLS IDX feed is no longer active on your website, possibly because of a non-compliance issue or by your request.
Researching	Market Leader is researching your write-in request for an MLS that was not on the list of known feeds for your area. Market Leader Customer Support will contact you to discuss and agree on next steps.
Acquiring new MLS	Market Leader is in the process of getting MLS approval and building a new MLS feed to add to the list of known feeds for your area.
Request Canceled	You canceled an application either through the Admin interface or by contacting Market Leader Customer Support.
IDX not available	An MLS IDX feed is not available. This might be because an MLS is for brokers only, or does not provide an IDX feed to anyone, or has exceeded a limit they imposed on the total number of IDX feeds available to agents.

Cancel an Application

Cancel an Application

While an MLS IDX application process is in **Agent: review instructions** status, **MLS Administration** provides a cancel action. Once an application status progresses beyond **Agent: review instructions**, you can no longer cancel it through the **Admin** interface. To cancel an application that has moved beyond **Agent: review instructions** status, you must contact Customer Support. To cancel an application use the following procedure.

1. Log into the Market Leader **Admin** user interface.
2. In the navigation list, click Admin.
3. Click **MLS Administration**.
4. For a specific MLS in **MLS Administration**, click the **Cancel MLS Request** icon ( ).
5. In **Cancel MLS Request**, confirm your choice.

Once an application has been cancelled, you cannot restart it from the **Admin** interface. To restart an application, you must contact Customer Support.

Add Office MLS ID

Add Office MLS ID

You can edit Office MLS ID information in **MLS Administration**. Recording an office MLS ID enables associated listings in **Featured Homes** on your website and in Manage Listings. To add an officd MLS ID, use the following procedure.

1. Log into the Market Leader **Admin** user interface.
2. In the navigation list, click Admin.
3. Click **MLS Administration**.
4. For a specific MLS in **MLS Administration**, click the **Edit MLS ID Information** icon ( ).

   The system displays an **Edit MLS ID Information** dialog box.
5. In **Office MLS ID**, enter an office MLS ID for which you have permission to display or advertise listings on your website or other websites.

   You can enter up to two (2) IDs. To add or delete IDs, click corresponding icons ( ).
6. Click **Save**.

In **MLS Administration** view, you can see **Office MLS IDs** you entered for a given MLS IDX feed.

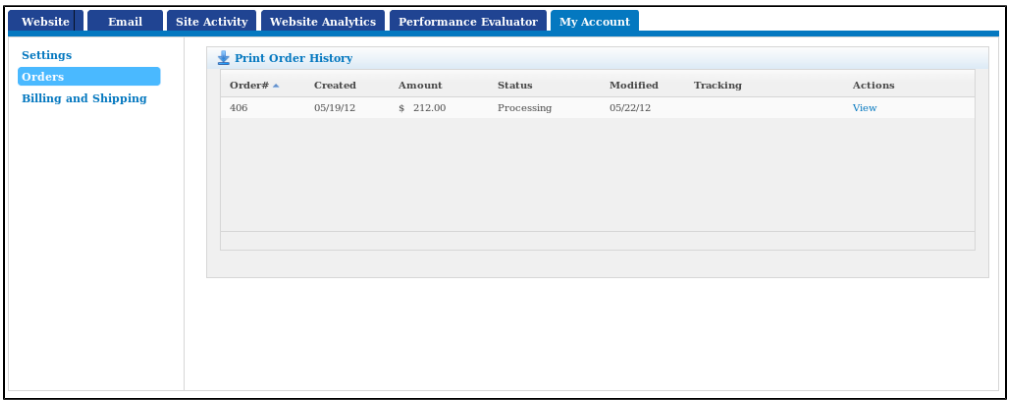
Orders

Orders

The **Orders** tool enables you to track and re-order marketing print orders. You can access Orders from My Account. The **Print Order History** panel contains a list of orders placed using print cart.

To Access Orders

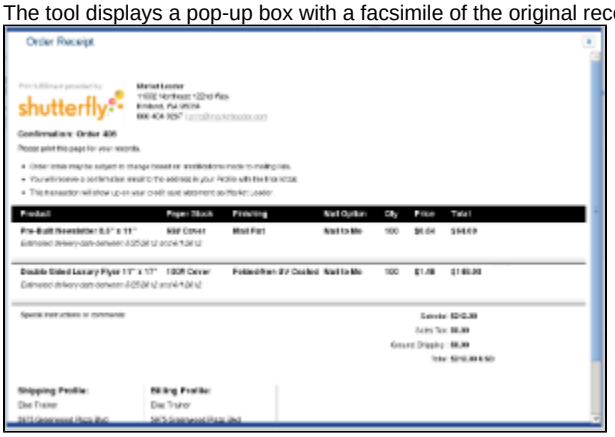
1. Visit My Account.
2. In the My Account tool, click **Orders**.
   The My Account view switches to an Orders view.



Each order includes a **View** action link. You can click this link to view an **Order Receipt** from Shutterfly, a print fulfillment service.

To View a Receipt

1. In **Print Order History**, click a **View** link corresponding to the order in which you are interested.
   The tool displays a pop-up box with a facsimile of the original receipt.

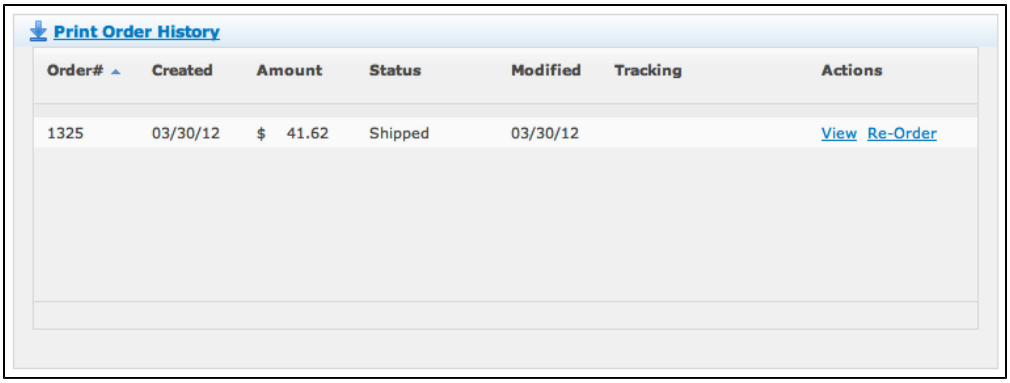


When **shutterfly** ships an order, the tool changes its order **Status** to **Shipped** and adds a **Re-Order** link to an order line item.

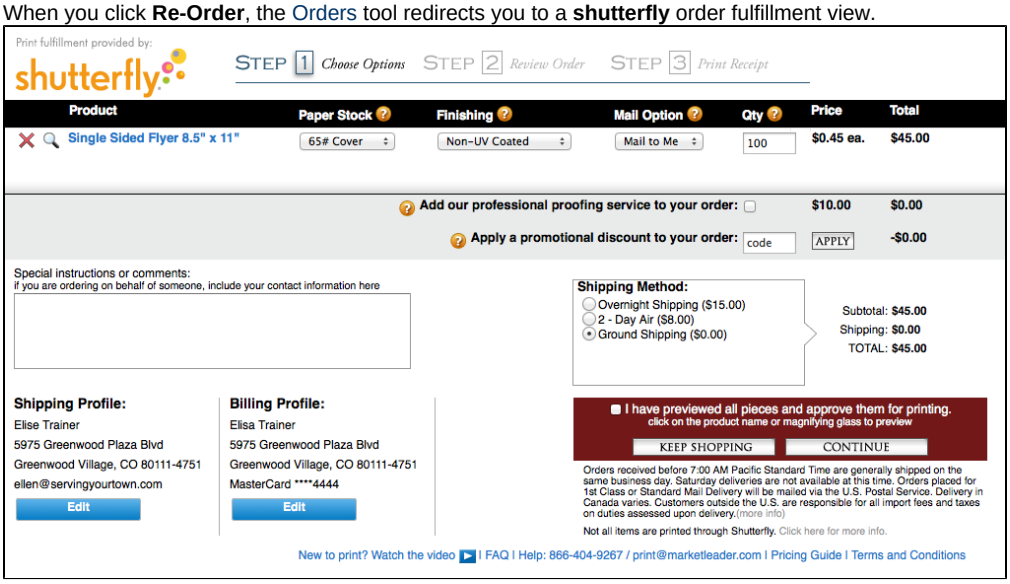
To Re-Order

Re-Order enables you to submit an order identical to one that has previously shipped.

1. In **Print Order History**, click a **Re-Order** link corresponding to an order you want to duplicate.



When you click **Re-Order**, the Orders tool redirects you to a **shutterfly** order fulfillment view.



For more help with **shutterfly** fulfillment, refer to the following.

- Print FAQ
- Print Pricing
- Order Professional Printing
- Terms and Conditions

Billing and Shipping

Billing and Shipping

The **Billing and Shipping** tool enables you to manage the following.

- Credit card payment method for a market leader subscription
- Credit card payment method for a prepaid campaign account
- Shipping address for marketing materials

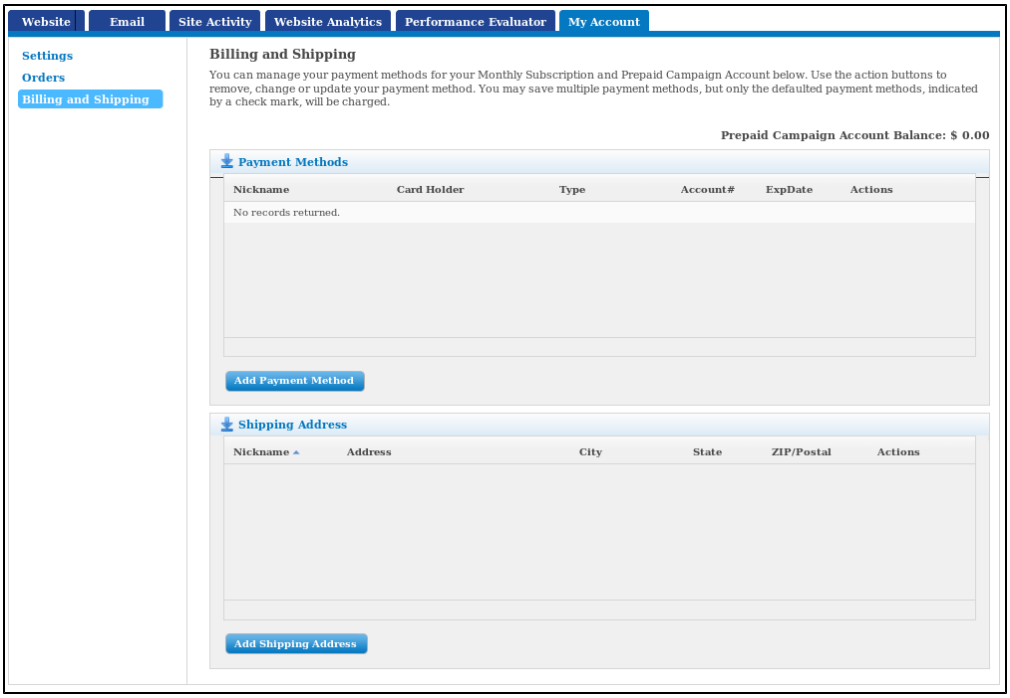
The following video describes how to manage a prepaid marketing account in My Account tool.

Set Up Billing and Shipping

The following procedures assume you are logged into a market leader **Admin** interface.

Access Billing and Shipping tool

1. In the navigation list, click Admin.
2. Click My Account.
3. In the My Account view, click **Billing and Shipping**.
   The My Account view switches to the Billing and Shipping view. This view includes two areas for managing **Payment Methods** and **Shipping Address**.



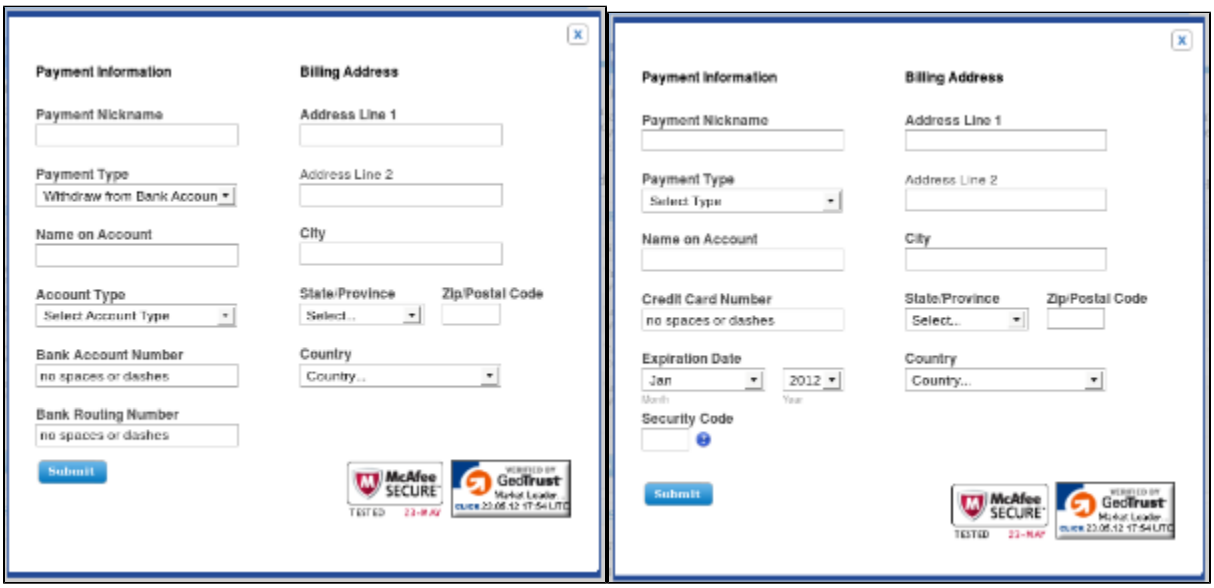
Add a Payment Method

When you accept a market leader quote, the system sets your default subscription payment method to the payment method you provide for the quote. Use this tool to add additional payment methods. To change a default payment method, if necessary, add another payment method, and then set it as a default payment method. You can have separate default payment methods for a monthly subscription and a prepaid campaign account. Payment methods include the following.

- American Express
- Discover
- Mastercard
- Visa
- Withdraw from Bank Account

To add a payment method, use the following procedure.

1. In the **Payment Methods** panel, click **Add Payment Method**.
   The tool opens a form for **Payment Information** and **Billing Address**.



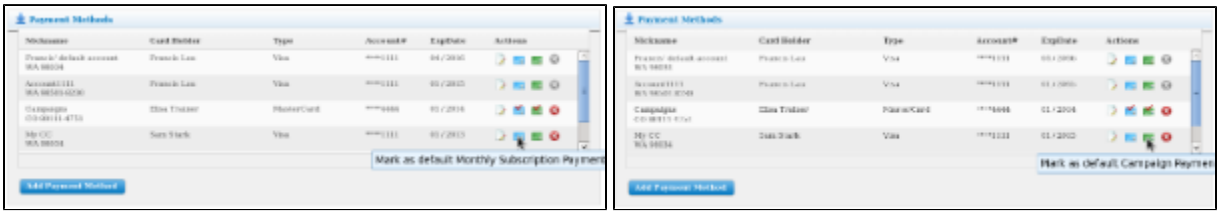
2. Complete all fields on the form.
   The tool attempts to validate Billing Address. If you do not enter a valid address, you cannot submit the form.

3. Click **Submit**.
   The tool adds the newly submitted method to Payment Methods.

Set Default Payment Methods

You can manually set default payment methods separately for a market leader monthly subscription and a prepaid campaign account using the following method.

1. In **Payment Methods**, click **Mark as default Monthly Subscription Payment Method (** **) or Mark as default Campaign Payment Method (** **) for a given payment method.**



When you click **Mark as default Campaign Payment Method**, the tool prompts you to **Accept** or **Decline** terms and conditions.
When you click **Mark as default Monthly Subscription Payment Method**, the tool immediately processes your request.

2. If prompted to accept terms, click **Accept** or **Decline** to confirm or cancel your choice, respectively.
   If you accept terms and conditions, the tool processes your choice and returns you to the Billing and Shipping view.

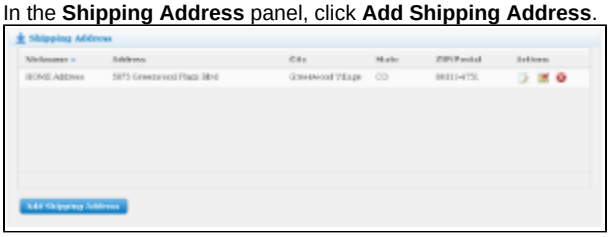
   A **Default Payment Method** ( ) or **Default Monthly Subscription Payment Method** ( ) icon indicates your choice.

Add Shipping Address

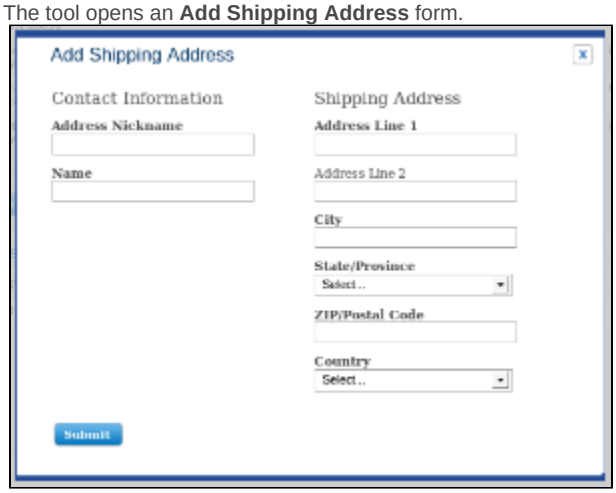
To use Campaigns, you must add a shipping address in the **Shipping Address** panel. market leader automatically sets the first address you add as the default shipping address. You can change this later by adding another address and manually setting it as the default.

To manage shipping addresses, use the following procedure.

1. In the **Shipping Address** panel, click **Add Shipping Address**.



The tool opens an **Add Shipping Address** form.



2. Complete all fields in the form.

   The tool attempts to verify the address. If you do not enter a valid address, you cannot submit the form.
3. Click **Submit**.

   The tool displays the newly entered address in the **Shipping Address** panel with the address marked as **Default Shipping Address** ( ).

To manage **Default Shipping Address**, use the following procedure.

1. In the **Shipping Address** panel, click a **Mark as Default Shipping Address** ( ) icon corresponding to the address you want to use as default.
2. Verify that the **Mark as Default Shipping Address** icon changes to **Default Shipping Address**.

Website

Website

Website tools enable you to manage text and functionality on a Market Leader consumer website. When you select **Website** in the **Admin** view, you see the following list of tools. For more information on each tool, visit the link.

The following list corresponds to a Business Suite subscription. If you ordered a different subscription, or you are not site owner, your view might be different.

- Titles and Descriptions
- Main Text
- Sell Text
- Career Info Text
- Site Images
- Search Widget
- Communities Served
- Featured Partners

- Listing Address
- Listing Search Areas
- Listing Search Fields
- Consumer Site Theme

The following graphic shows the **Website** tools view. Your view might differ depending on your Market Leader subscription.

Titles and Descriptions

Titles and Descriptions

The **Titles and Descriptions** view enables you to change the text that appears in the browser title bar and the meta description for the following pages. Depending on which Market Leader product you purchased, some of these settings might not be available to you.

- About Us Page
- Career Page (Professional and Business Suite)
- Finance Page (Professional and Business Suite)
- Find a Home Page
- Home Page
- Local Page
- My Tools Page
- Registration Page
- Sell a Home Page

To Change Titles and Descriptions

This procedure assumes you are already logged into the Market Leader **Admin**user interface.

1. In the navigation list, click **Admin**.
2. On the **Website** tab, click **Titles and Descriptions**.
3. In the **Titles and Descriptions** view, select a page name from the drop-down list.

   The view presents **Page Title** and **Description** form entry fields for the selected page.
4. To change the text that appears in the browser title bar, edit the **Title** field.
5. To change the meta description text for the page, edit the **Description** field.

   A search engine might use this text as a snippet description in search results. Google does *not* use this text for page rank, so there is no benefit in stuffing it with keywords.
6. Click the **Save** button.
7. To change another page text, repeat the previous steps for a different page.

Main Text

Main Text

The **Main Text** view enables you to change the text that appears on the home page of the consumer website.

To Change Main Text

This procedure assumes you are already logged into the Market Leader **Admin** user interface.

1. In the navigation list, click **Admin**.
2. On the **Website** tab, click **Main Text**.

   The view presents an HTML editor containing the current contents of the **Main Text**.

3. In the HTML editor, enter the text you wish to display on the **Home** page.

   You can use the editor tools to format the text including text effects, paragraph styles, fonts, font size, font color, list styles, indents, links,

graphics, and more. You can even switch it to HTML source view and edit the HTML source directly.

4. When you are finished editing the **Main Text**, click the **Save** button.

Sell Text

Sell Text

The **Sell Text** view enables you to change the text that appears on the **Sell a Home** page of the consumer website.

To Change Sell Text

This procedure assumes you are already logged into the Market Leader **Admin**user interface.

1. In the navigation list, click **Admin**.
2. On the **Website** tab, click **Sell Text**.

   The view presents an HTML editor containing the current contents of the **Sell Text**.
3. In the HTML editor, enter the text you wish to display on the **Sell** page.

   You can use the editor tools to format the text including text effects, paragraph styles, fonts, font size, font color, list styles, indents, links, graphics, and more. You can even switch it to HTML source view and edit the HTML source directly.
4. When you are finished editing the **Sell Text**, click the **Save** button.

Career Info Text

Career Info Text

The **Career Info** view enables you to change the text that appears on the **Career** page of the consumer website. You can access the **Career** page from a link in the footer section of every page. The **Home** page also contains a sidebar area with links to the **Career** page.

This feature applies exclusively to Business Suite .

To Change Career Info

This procedure assumes you are already logged into the Market Leader **Admin**user interface.

1. In the navigation list, click **Admin**.
2. On the **Website** tab, click **Career Info**.

   The view presents an HTML editor containing the current text of the **Career** page.
3. In the HTML editor, enter the text you wish to display on the **Career** page.

   You can use the editor tools to format the text including text effects, paragraph styles, fonts, font size, font color, list styles, indents, links, graphics, and more. You can even switch it to HTML source view and edit the HTML source directly.
4. When you are finished editing the **Career Info**, click the **Save** button.

Site Images

Site Images

The **Site Images** view enables you to change the **Site Banner** and **Agency Logo** images of the consumer website.

After updating an image, to view the change on the consumer website, you might have to clear your browser cache.

To Change Site Images

This procedure assumes you are already logged into the Market Leader **Admin** user interface.

1. In the navigation list, click **Admin**.
2. On the **Website** tab, click **Site Images**.

   The view presents a form for adding the images. If no images have been uploaded, the form displays a box with a **No Existing Logo** or **No Existing Banner** message and an **Add** button for each box. If you already uploaded a graphic, the form displays a thumbnail of the image and an **Edit** button.

3. In the **Review and Edit Your Website Images** form, click the **Add** (or **Edit**) button corresponding to the image you want to upload.

The system displays a pop-up form where you can either upload your own image file or choose images from a catalog.

4. Depending on whether you want to upload your own or choose from the catalog, use one of the following procedures.
    - Upload your own
        a. Click **Browse**.
        b. In the **Open** dialog, select your graphic file.
        c. Click **Open**.

        …OR…

    - Choose from the catalog
        - Logos
            a. Use the drop-down list to select an agency.
            b. Click **Search**.
            c. Click the logo you want to use.

                The system displays the selected logo under **Current Logo**.

            d. Click **Save**.
        - Banners
            a. Enter a keyword or location term in the search box, to narrow the choices.
            b. Click **Search**.
            c. Click the banner image you want.
            d. Click **Save**

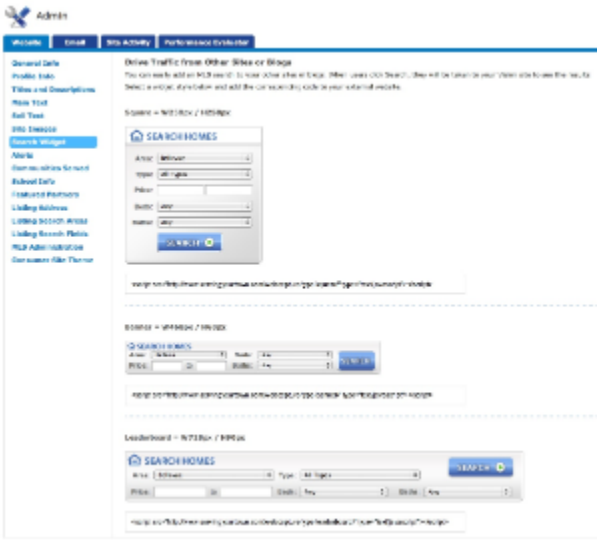
Search Widget

Search Widget

The **Search Widget** view enables you to copy a script block to another website that provides the other website with an MLS **Search Widget** connected to your Market Leader domain. When users search on the other website, using the widget, they are driven to your Market Leader consumer website for results. The Search Widget tool provides the following widget styles from which you can choose.

Name	Width x Height (pixels)
Square	250 x 250
Banner	468 x 60
Leaderboard	728 x 90

Copy a Search Widget



This procedure assumes you are already logged into the Market Leader **Admin** user interface.

1. In the navigation list, click **Admin**.
2. On the **Website** tab, click **Search Widget**.

   The Search Widget view presents each widget style choice with a sample image and a read-only text box that contains search widget code.

3. Select the entire contents of a search widget text box.

   The selection should look like the following. **Do *not* copy this example**, because it does not use *your domain* name, nor does it include a valid choice, and it will not work. Only copy search widget code from your Market Leader Admin interface.

   ```
   <script src="http://yourDomain.com/webcapture/type/choice/" type="text/javascript"></script>
   ```

4. Copy the selection to your computer clipboard.
5. Paste the code into an email or text message to send to the maintainer of the other site, or paste it into the source code of the destination web page yourself.

Communities Served

Communities Served

The **Communities Served** view enables you to manage a list of the areas that you cover as an agent. On the **Home** page of the consumer website, Market Leader displays a list of the areas you serve. The **Communities Served** list links website visitors to specific information on a community.

The **Communities Served** list affects the following.

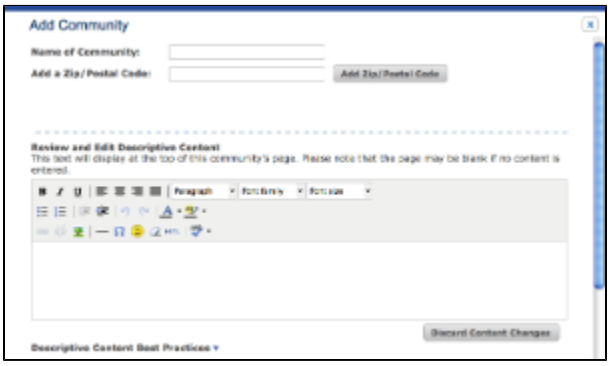
- Every community name you add will display in the **Search Widget** area drop-down list.
- If you are a broker or a team leader and you have chosen to participate in the referral network, then the ZIP codes you add in **Communities Served** will dictate both the outgoing and incoming referrals.

If you are a Business Suite user, see your site owner to use this feature.

To Add a Community

This procedure assumes you are already logged into the Market Leader **Admin**user interface.

1. In the navigation list, click **Admin**.
2. On the **Website** tab, click **Communities Served**.
   The view displays the currently configured list of areas you cover.
3. To add a new community, click the **Add Community** button.
   The tool opens an **Add Community** form.



4. In the form, enter a community of your choosing.
5. In the **Add a Zip/Postal Code** text box, enter a code. (Required)
6. Click **Add Zip/Postal Code**.
   You can add additional zip codes to this community as needed.
7. In **Review and Edit Descriptive Content** text area, let your local expertise shine through with styled copy using the WYSIWYG editor.
8. To configure an information marker on the website map for this community, click **Add Center**.

You can adjust the map scale and click and drag the marker to place it in the desired location. The marker appears on the **Move** page map.

If you want to delete a center, you must delete the community and then create a new one with the same ZIP Codes.

9. To add a **Community Info URL**, click the **Create URL**button or enter an URL of your own choosing. If you enter your own URL, you must include the protocol as follows.

```
http://mycommunityinfourl.com
```

The **Community Info URL** adds a link for more information on the community to the **Move** page. The **Create URL** button automatically generates a link to a Wikipedia page for the community. If the button does not create a link when clicked, try zooming in and moving the marker to a more precise location, and click the button again.

10. Click **Save**.

To Edit or Delete a Community

This procedure assumes you are already logged into the Market Leader **Admin**user interface.

1. In the navigation list, click **Admin**.
2. On the **Website** tab, click **Communities Served**.

   The view displays the currently configured list of areas you cover.
3. Click on an **Action** icon to edit ( ) or delete ( ) entries in the list.

Featured Partners

Featured Partners

The **Featured Partners** view enables you to manage a list of business associates with which you network. If you have configured a **Featured Partner**, the Market Leader **Home** page displays a **Featured Partner** sidebar panel that enables you to help promote your network. If you provided a company URL when you configured the partner, the sidebar item links website visitors to the parnter company website. In addition, the **Home** page provides links to your **Partners** page, where website visitors can view all of your partners.

If you are a Business Suite user, see your site owner to use this feature.

To Add a Featured Partner

This procedure assumes you are already logged into the Market Leader **Admin**user interface.

1. In the navigation list, click **Admin**.
2. On the **Website** tab, click **Featured Partners**.

   The view displays the currently configured list of **Featured Partners**.
3. To add a parnter, click the **Add Partner** button.
4. In the **Add a Featured Partner** dialog box, enter the name of the **Company Name**.

   Optionally, enter an URL, contact name, email, phone, image, and/or description. The only required field is **Company Name**. The **Home Page** checkbox controls whether or not this partner will be shown on your website home page. If you do not check this, they only appear on the **Partners** page.
5. Click **Done**.

The **Featured Partners** list includes the following rules.

- You can have as many featured partners as you like.
- If you have no partners configured, the **Home** page does *not* display the **Partners** sidebar panel.

- If you have not enabled **Home Page** for any partners, the sidebar panel only displays a link to your **Partners** page.
- The consumer website only shows one partner at a time on the **Home** page. If you select more than one partner to be on the **Home** page, the system automatically rotates the featured partner.
- If your brokerage works with a lender, the lender will not automatically be included as a **Featured Partner**, though you can add them as well.
- When adding a partner, you must use entire URL including the protocol as follows.

```
http://
```

To Edit or Delete a Featured Partner

This procedure assumes you are already logged into the Market Leader **Admin**user interface.

1. In the navigation list, click **Admin**.
2. On the **Website** tab, click **Featured Partners**.

   The view displays the currently configured list of partners.
3. Click on an **Action** icon to edit ( ) or delete ( ) entries in the list.

Listing Address

Listing Address

The **Listing Address** view enables you to configure the *default* setting for showing or hiding the addresses of listings on the consumer website. This is a default setting in the sense that you can override it for individual contacts. To override this setting for an individual contact, see Contact Summary.

If your MLS rules do not permit the display of addresses, then this setting will have no effect. Addresses will not display on your website.

To Show or Hide Listing Addresses for Contacts

This procedure assumes you are already logged into the Market Leader **Admin** user interface.

1. In the navigation list, click **Admin**.
2. On the **Website** tab, click **Listing Address**.
3. Click the radio button of your preference for the default setting.
4. Click **Save**.

Listing Search Areas

Listing Search Areas

The **Listing Search Areas** view enables you to specify areas that your website visitors can search according to the following criteria.

- Neighborhoods
- Zips
- Nearby Cities

These specifications only affect the consumer website. They do *not* affect the searchable areas within your Market Leader system, where you can search all areas that your MLS covers.

If you are a Business Suite customer, ask your broker or site administrator to edit these options.

To Specify Searchable Areas

This procedure assumes you are already logged into the Market Leader **Admin** user interface.

1. In the navigation list, click **Admin**.
2. On the **Website** tab, click **Listing Search Areas**.

   The view provides the following radio button options.
   - **Allow visitors to search all areas**---visitors can use your website to search any area that your MLS covers.
   - **Select the areas visitors can search**---visitors are limited by your search area criteria.
3. To limit searchable areas, click **Select the areas visitors can search**.

The view displays a list of the currently searchable areas.

4. To add a searchable area, click the **Add Search Area** button.

   The **Add Search Area** dialog box presents tabs for **Neighborhoods**, **Zips**, and **Nearby Cities**.
5. Click a tab and check off any areas that you want to be searchable.

   You can expand the number of areas you see in these lists with radius options at the top.
6. When you are finished selecting areas, Click the **Add** button.

   The dialog box closes and you are returned to the **Choose Your Listing Areas** screen.
7. To remove an area that you've added, click the **Delete** icon ( ) next to the **Area** you want to delete.

   If the **Delete** icon is gray, that area cannot be removed because it is one of the areas where your site is advertised. For example, if you advertise as a site that provides Seattle listings, you cannot remove Seattle as a searchable area.

See Also

Listing Search Fields

Listing Search Fields

Listing Search Fields

The **Listing Search Fields** view enables you to specify which search filter controls to include in the **Find a Home** search tool of your consumer website. The **Listing Search Fields** settings do *not* affect the controls you can use while logged into the Market Leader **Admin** user interface.

If you are a Business Suite user, work with your broker or site administrator to edit search fields.

To Specify Listing Search Fields

This procedure assumes you are already logged into the Market Leader **Admin**user interface.

1. In the navigation list, click **Admin**.
2. On the **Website** tab, click **Listing Search Fields**.
3. Use the checkboxes to specify which fields to show on your website.
4. Click the Save button.

The Market Leader system might offer search fields that are not supported by your MLS. If you are not familiar with what data your MLS provides and how they organize listing types, review your changes by trial and error. Apply changes and then review your website. Try using the search fields to verify that they work as expected.

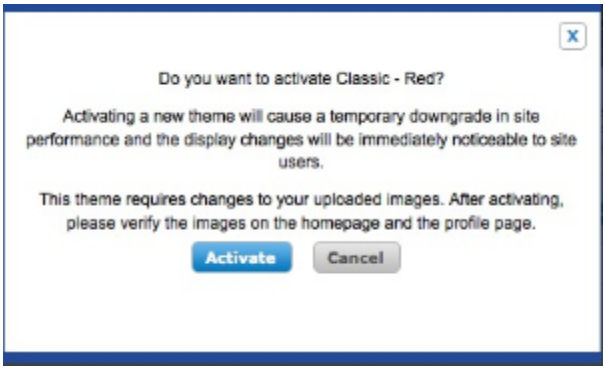
For example, your MLS might not provide Waterfront information. If you added this search field to your website, it might cause confusion for your website visitors. Some MLS systems treat rentals as a property type while other MLS systems treat rentals as a listing type. If you are not sure how your MLS treats rentals, you should try different settings and make sure your website is working properly.

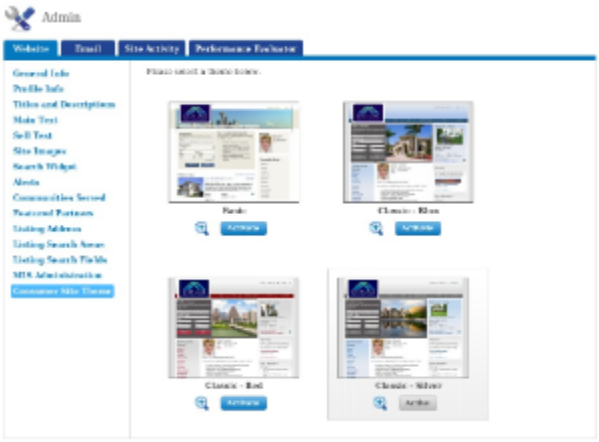
See Also

Listing Search Areas

Consumer Site Theme

Consumer Site Theme





This topic describes the **Consumer Site Theme** view found in the Market Leader Admin interface. The Consumer Site Theme view enables you to change the set of styles that determine the look and feel of a consumer website. The theme has no effect on the Admin interface.

When you open Consumer Site Theme, the system displays the available themes for your Market Leader product type. Each theme includes a thumbnail image, an activate button, and a zoom icon ( ). The system highlights the thumbnail of the current theme and displays it with an **Active** button. The **Active**button does not trigger any action. It is for display only. Depending on your product type, you might see one or more of the following themes.

- Basic
- Classic - Blue
- Classic - Red
- Classic - Silver

Activate Theme

The following procedure assumes you are logged into the Market Leader Admininterface.

1. In the navigation list, click **Website**.
2. On the **Website** tab, click **Consumer Site Theme**.

   The system displays thumbnails of available themes with preview and activate tools for each.
3. Optionally, using a zoom icon, preview an enlarged image of a theme.
4. For your selected theme, click **Activate**.

   The system displays a confirmation box.
5. Carefully read the confirmation message, as the theme change might require further action on your part.

   For more information, see Site Images.
6. To confirm, click **Activate**.
7. To verify the theme change, visit your website.

Email

Email

The Market Leader system sends several types of email to contacts on your behalf. They include the following.

- Welcome email
- Listing alert campaign message
- Initial contact email
- Listing alert

You can review and update some of the text that the system sends to contacts. You can also add or edit message templates and change your default email signature.

Welcome Email

The system sends a welcome email to contacts when they sign up on your website. It contains login information and instructions on how to return to the site. You can view the full text sent to a contact in the Emails Sent to Contact section of the Contact Summary. The welcome email contains critical login information. To ensure that it avoids most spam blockers, Market Leader provides carefully crafted default text for the welcome email, which you can edit using your Admin Email tool.

If a contact email account does not accept this message, the system assumes that the contact provided an invalid email address and does not allow the contact to sign into your website. If the contact provides a new email account, the system sends a new welcome email and both welcome emails show up in the Emails Sent to Contact section of the Contact Details section.

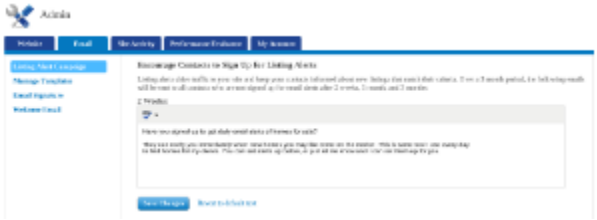
Admin Email Tools

When you are viewing the **Admin** tools with the **Email** tab selected, you see the following links. Each link in the user interface has a corresponding page in this section.

The following list corresponds to the Business Suite product. If you purchased a different product or you are not site owner, your view might be different.

- Listing Alert Campaign
- Message Templates
- Email-Only Accounts
- Email Signature
- Welcome Email

The following graphic shows the **Admin** tools view with the **Email** tab selected. Your view might differ depending on which product you purchased.



Listing Alert Campaign

Listing Alert Campaign

The **Listing Alert Campaign** view enables you to edit the text of automatic, followup email messages for contacts that have not set up a listing alert or have not sent email to you. The Market Leader system sends these automated emails on a 2 week, 1 month, 3 month schedule.

By default, the **Listing Alert Campaign** requires no action on your part. If you want to change any of the default text, you can use this tool to change it.

To Edit Listing Alert Campaign Email Text

This procedure assumes you are already logged into the Market Leader **Admin** user interface.

1. In the navigation list, click **Email**.

   The view displays the **Listing Alert Campaign** view by default. This view includes a text area input field for each of the three follow-up email messages (i.e. 2 Weeks, 1 Month, and 3 Months).

2. For each follow-up type, compose the message text to suit your preferences.
3. When you are finished, click **Save Changes**.

   You can always revert to the default text by clicking **Revert to default text**.

Message Templates

Message Templates

The **Message Templates** view enables you to edit the template text of various email types that the Market Leader system sends. Message templates provide pre-written text for you to use in new email messages that you send to contacts. You can use the ones provided by the system as-is or edit them to meet your needs. In addition, you can create your own custom templates. When you create a new email or reply to an email, the **Compose Message** view provides a drop-down list of message templates from which to choose.

To manage message templates, you have the following choices.

- Edit Existing Template
- Add New Message Template

The following procedures assume you are already logged into the Market Leader **Admin** user interface.

Edit Existing Template

1. In the navigation list, click **Email**.
2. Under the **Email** tab, click **Message Templates**.

   For lenders, click Welcome Email. It is the only message template for the lender role.

3. In the drop down list that says **Select a message**, select an existing message name.

   The Admin tool displays the current contents of the message template.

4. To change the template contents, click the **Edit** button.

   The view displays editable fields for the template name, subject, and message text.

5. Apply your changes to any of the template fields.
6. When you are finished editing the template, click the **Save** button.

Add New Message Template

1. In the navigation list, click **Email**.
2. Under the **Email** tab, click **Message Templates**.
3. Click the **New Message Template** button.
4. In the **Template** input field, type a name for the template.

   This name is only used internally by you to recognize and choose the template in Market Leader.

5. Specify a **Subject** for the template.

   The Subject appears on the subject line of the email.

6. In the **Message** text area, type the template message.

   The template message is the body of the email.

7. Click the **Save** button.

Email-Only Accounts

Email-Only Accounts

The **Email-Only Accounts** view enables you to manage forward-only email addresses for people in your organization who do not need a subdomain (i.e. agent website) and do not need to be listed as an agent with your brokerage. The **Email-Only Account** associates a Market Leader email address with an existing email address for a person.

With the **Email-Only Accounts** view, you can add, edit, or delete accounts. You can also resend the login information for an account. The following procedures assume you are already logged into the Market Leader **Admin** user interface.

To Manage Email-Only Accounts

1. In the navigation list, click **Email**.
2. On the **Email** tab, click **Email-Only Accounts**.

   The view displays a list of existing accounts **Email-Only Accounts** and a form for adding additional accounts.
3. To add, edit, or delete an account use one of the following procedures.
   - Add
   - Edit
   - Delete
   - Resend Welcome Email

To Add Email-Only Accounts

1. If necessary, scroll to display the **New Email-Only Accounts** form which follows the **Current Email-Only Accounts** list.
2. For each new account, type a unique **Email Prefix**, assign a **Password**, and enter a valid existing forwarding email address, that is not already part of the Market Leader system.
3. When you are finished, click **Add**.

   You can add up to 9 new accounts at one time.

   The system sends the new users their login information. To add more than nine, repeat the previous steps.

To Edit Email-Only Accounts

1. If necessary, scroll to display the **Current Email-Only Accounts** list.
2. Next to the list title, click the **Edit** link.

   The the **Password** and **Existing Email** fields become editable in the list.
3. Modify any of the entries in the list.
4. Click the **Save Changes** button.

To Delete an Email-Only Account

1. If necessary, scroll to display the **Current Email-Only Accounts** list.
2. Find the **Email Prefix** that you want to delete.
3. On the row of the target account, click the **Delete** icon ( )

To Resend a Welcome Email

1. If necessary, scroll to display the **Current Email-Only Accounts** list.
2. Find the **Email Prefix** that you want to resend a welcome email.
3. On the row of the target account, click the **Resend Welcome Email** icon ( )

Email Signature

Email Signature

The **Email Signature** view enables you to maintain the signature block for email sent from your Market Leader account. Using signatures helps avoid problems with spam-blockers and saves time. The Market Leader system adds the signature on all emails sent to contacts. It uses your contact information for the default signature content.

To Change Email Signature

This procedure assumes you are already logged into the Market Leader **Admin** user interface.

1. In the navigation list, click **Email**.
2. On the **Email** tab, click **Email Signature**.

   The view displays an editable text area that contains the current email signature.

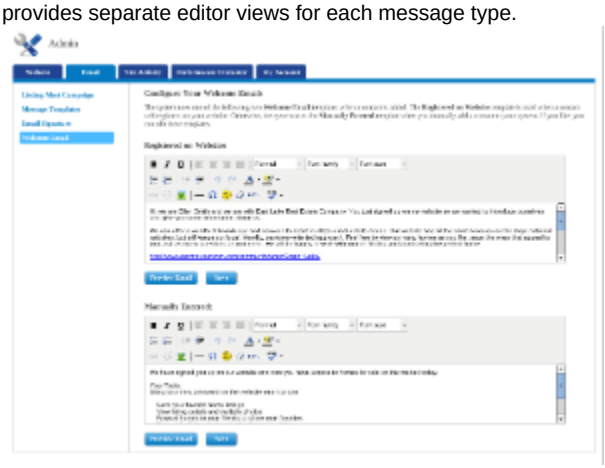
3. Apply changes to the signature text.
4. Click **Save**.

Webmail does *not* use this signature. You must configure the Webmail signature separately.

Welcome Email

Welcome Email

The **Welcome Email** view enables you to customize a text message that goes out in an email to new contacts. The system uses different messages depending on whether a contact signed up on a consumer website or an agent manually added a contact. The Welcome Email tool provides separate editor views for each message type.



To Change Welcome Email

This procedure assumes you are already logged into the Market Leader **Admin** user interface.

1. In the navigation list, click **Admin**.
2. Click the Email tab.
3. On the **Email** tab, click **Welcome Email**.

   The view presents HTML editors containing the current contents for each type of **Welcome Email**.
4. In an HTML editor, enter the text you wish to display in a Welcome Email.

   You can use the editor tools to format the text including text effects, paragraph styles, fonts, font size, font color, list styles, indents, links, graphics, and more. You can even switch it to HTML source view and edit the HTML source directly.
5. Optionally, click **Preview Email** to view the email in a pop-up.
6. When you are finished editing a **Welcome Email**, click **Save**.

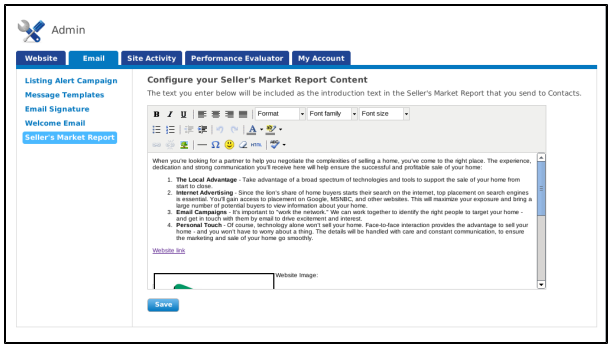
Useful Tips

- After you save changes to Welcome Email templates, you might want to create a test contact from your consumer site and verify that the test contact receives a Welcome Email and it is accurate. If you have malformed HTML in your templates, the email send might fail or it might not render correctly.
- Do not copy and paste text from Microsoft Word to Welcome Email templates. Microsoft Word does not adhere to common HTML standards, so copying and pasting formatted text from Word into a Welcome Email template can cause unexpected results.

Seller Market Report

Seller Market Report

The **Seller Market Report** view enables you to maintain default text that appears in a Seller Market Report. The tool provides an editor for composing HTML (rich text) emails. Your text can include up to 5000 characters. Market Leader provides default text out of the box. You can use the text as-is, or modify it to suit your specific requirements. This text initially populates the content area of a report. When you configure a specific report, you have an opportunity to modify the content for that specific report.



To Change Seller Market Report Content

This procedure assumes you are already logged into the Market Leader **Admin** interface.

1. In the navigation list, click **Admin**.
2. Click the **Email** tab.
3. On the **Email** tab, click **Seller Market Report.**

   The view presents an HTML editor with the current Seller Market Report content.

4. Modify the content to meet your requirements.
5. When you are finished, click **Save**.

Site Activity

Site Activity

The **Site Activity** view provides you with tools to analyze the visitor and contact traffic on your consumer website. You can see the number of contacts you have received by source for up to 12 months and detailed source information—such as how many people are coming to your site because of syndication or personal marketing campaigns for up to 180 days.

The **Site Activity** view is a reporting tool. The reports use preset queries for which you can vary the time period of the query. It includes the following reports.

- **New Contact Count**

  Shows a bar graph of traffic counts with data grouped by sources Market Leader, Advertising, and Personal Marketing.

- **Visitor & Contact Sources**

  Shows details of URLs from where **Visitors** and **Contacts** come. It shows **Visitors** and **Contacts** referrer URLs grouped by Market Leader and Personal Marketing. You can expand each group to view more detailed grouping of the data.

- **Search Links**

  Shows **Visitors** and **Contacts** referrer URLs filtered by domain name. Instead of grouping the results, this report shows the source type (e.g. SEO or syndication) as a separate column.

The following sections explain the groupings in the **New Contact Count** graph.

Market Leader

The Market Leader category shows the count of contacts resulting from listing syndication, natural search, and email. It includes the following sources.

- Listing Syndication
- Craigslist
- Search Widget
- Search Engine Optimization (We know the source URL, but these URLs don't fall into other categories.)
- Market Leader Campaigns & Emails (listings, listing alerts, welcome email, campaign, etc.)
- Referrals (Contacts received from other agents who used the "transfer" link)

Advertising

The Advertising category shows the count of contacts resulting from paid traffic that Market Leader provides. It includes the following sources.

- Google

*This is a requirement of being a Certified Google Reseller.

- Other Ad Campaigns (All Market Leader advertising except Google)

Personal Marketing

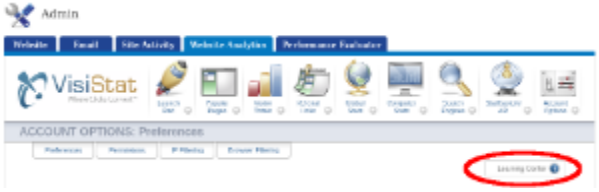
The Personal Marketing category shows the count of contacts resulting from brokerage's personal marketing activities plus a count of contacts entered or imported by agents. It includes the following sources.

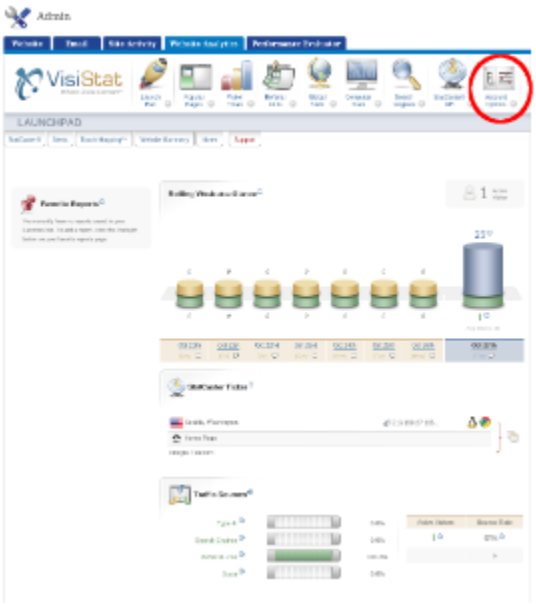
- Offline Marketing (We do not have URL from which visitor/contact came to Market Leader. E.g., business card, flyer, or any other source we can't track.)
- Online Marketing (Blogs, links, domain forwarding, etc.) *for source to be reported accurately, the ref tag (?ts=leader) must be used. (e.g. www.ServingYourTown.com/?ts=leader)
- Entered / Imported

Website Analytics

Website Analytics

The **Website Analytics** view provides a full suite of statistical reporting on a consumer website. For more information on Website Analytics, see VisiStat Learning Center.





Open Learning Center

To open Learning Center, use the following procedure.

1. In the navigation list, click **Admin**.
2. Select **Website Analytics**.
3. On the **Website Analytics** tab, click **Account Options**.
4. In the **Account Options** pane, click **Learning Center**.

   Learning Center opens in a new window.

Performance Evaluator

Performance Evaluator

The **Performance Evaluator** view provides benchmark comparisons that show how your use of the Market Leader system compares with that of known successful agents. Each benchmark provides coaching tips for how to improve.

To Use Performance Evaluator

This procedure assumes you are already logged into the Market Leader **Admin**user interface.

1. In the navigation list, click **Performance Evaluator**.
2. On the **Performance Evaluator** tab, peruse the benchmark data.

   Performance Evaluator includes quick **Status** indicators to indicate par ( ) or sub-par ( ).
3. Pick a sub-par benchmark, if any, and resolve to take action on that benchmark within the next, say, 24 hours.
4. Take pride in your achievements.

Testing

Setting Up a Test User for Testing

Many agents set themselves up as a test contact to better understand what the experience is like for a contact who registers on their website. With a test contact, you can view listings, look at the consumer website from a contact point of view, and send emails to yourself like you send to contacts. With an understanding of how the website works for a test contact, you are able to provide better assistance to contacts when they contact you.

To Set Up a Test Contact

1. If you are currently signed into your Market Leader **Admin** account, you must first sign out of the **Admin** panel.

   In the upper-right corner, click the logout link.

2. Go to the consumer website by entering your Market Leader domain name (e.g. yourdomain.com) in the browser navigation bar.

   To create a test contact, you need to register as a user on the consumer website.

3. To register as a user, click **Create an Account**, or alternatively, click **My Tools** to access a registration form.
4. Complete the registration process as if you were a contact.

   Do not use your Market Leader system email address as the **Email** address. Use any contact name and any non-Market Leader, valid email address that you can quickly identify as a test account.

5. On the **Find a Home** tab, conduct a search.
6. In the search results, click a listing.
7. On the listing detail page, using the **Nearby Listing** panel, click a nearby listing.

   The search and the nearby listing actions give the system some sample information for the Initial Contact Wizard (ICW) and for you to work with when viewing the test contact from the **Admin** panel.

Using Market Leader

Using Market Leader

This section describes how to effectively use the Market Leader **Admin** interface.

The Essentials section applies to users of any product including the following.

- Essential
- Professional
- Business Suite

The For Business Suite & Professional and For Lenders sections apply to users of the following.

- Professional - site owner
- Business Suite - site owner

Essentials

Essentials

This section describes Market Leader product functionality available to the following users.

- Essentials - site owner
- Professional - non-owner
- Business Suite - non-owner

Best Practices

Best Practices

This section provides pointers to help you get started and succeed in the market place.

The system provides dozens of features, but the most value comes from a handful of simple tasks. You may find that managing your contacts is not about how much work you put in, but how quickly you attend to these few important tasks. After you learn how to move around the site and use the basic tools, you will not need to spend a lot of time on your computer. However, you will need to log in several times a day to make sure that you keep up with new contacts.

Logging into Market Leader

1. Once your account is provisioned.
2. Go to your website (e.g. servingmainstreetusa.com).
3. If necessary scroll down to find **Admin Login**.
4. Click **Admin Login**.
5. In the **Login** form, enter your credentials.
6. Click **Login**.

You can also log in from an internet ready cell phone. See details at Cell Phone Access to Market Leader

This section includes the following topics.

- Contact New Contacts
- Stay Connected
- Get Organized
- Advertise Your Site

See Also

Contact Summary
Recent Activity
Contacts - Lender

Contact New Contacts

Contact New Contacts

Contact your new contacts as soon as possible. It is critical that you respond to your new contacts quickly. Year after year, studies show the faster you respond to a contact the more likely they will turn into a client.

Contacts with phone numbers

Make a phone call as soon as possible. The best way to contact a new contact is by phone, it is the fastest and most direct means to let the contact know you are here and ready to assist them. The calls should be friendly, without a sales message. Let them know that you are available to help them with the website and to provide additional information about the listings they see. Use the **Initial Contact Wizard** for specific steps to make the appropriate phone call.

Customers who do not want to personally make phone calls can subscribe to **First Call**. With **First Call**, the Market Leader call center calls new contacts on your behalf. The call center asks the contact questions and passes on their notes as comments in the contact's summary section.

Unless you are using the Market Leader **Professional** package, you have to talk to your broker or team leader to use **First Call**.

Contacts without phone numbers

Send an email message as soon as possible. Use the **Initial Contact Wizard** to build the appropriate email for contacting a new contact.

Stay Connected

Stay Connected

Stay connected to your contacts. One of the biggest mistakes agents make is taking too long to respond to incoming email messages.

An agent who checks the system every couple of days takes a couple of days or more to respond to messages from potential customers. People who make the effort to contact you are very good contacts, so it is essential to respond to them promptly.

Contacts often become active after they sign up to view listings, see a home they were interested in, and contact you about it. If they do not get a quick response, they may seek answers elsewhere or lose interest altogether. If you take a day or two to respond to messages, you jeopardize your chances of turning your contacts into real customers. The sooner you respond to contact needs, the more likely they are to turn to you for assistance in the future.

Ways to stay connected

Put your cell phone number on the website so that customers can easily contact you.
Set up **Alerts** so that you will immediately receive a notification on your cell phone or at an external email address when you get new activity from your contacts or a new contact.

Check your email regularly by logging into the system a few times a day. The **New messages** list on the dashboard shows all new email messages from contacts.

After you answer an email message, click the **File Message**icon ( ) to mark in the system that you are processing your incoming email. When you file a message, it is removed from the **New messages** list. You can still access the filed email from the contact details page. Filing old messages helps reduce the clutter so you can focus on new messages.

Get Organized

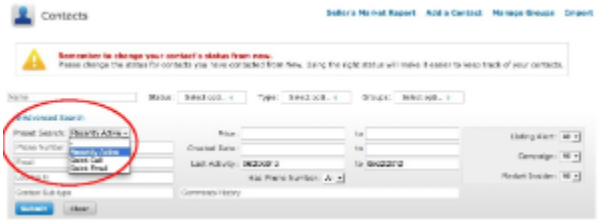
Get Organized

Use contact status to get organized and focus on the best contacts. The system offers a variety of contact status options to allow you to categorize your contacts so you can identify and focus on your most active contacts. Below are some suggested steps on how to use & update contact status.

Organize your contacts by doing the following

- Make sure to communicate with new contacts quickly. After you contact a new contact, change the status to **Retry** or **Active**.
- Make sure that all contacts marked **Active** are responding to your messages or calls, are visiting the site, or are viewing listings. If they are not, then change the status to **Retry** or Inactive*.
- Review the **Recent Activity** page (Fig. 1) to see all contacts who have returned to your website in the last 48 hours. Change the status for each contact in this list to either **Active** or **Retry**. Mark as **Active** any contacts you communicate with directly who appear to be viable contacts. Set the status of everyone who does not respond to you within two weeks as **Retry**.
- Periodically review your contacts with the status of **Retry** to see all contacts who have not responded to you recently. Review when each contact last visited your site. Attempt to reach out via phone or email to those who visited your site in the last two weeks. Try to engage them about any listings they have viewed or saved. If contacts are not on **Listing Alerts**, ask if they want to be. If any contact has not visited your site for two weeks, set the status for that contact as **Inactive**.

The following graphic shows the link to open the Recent Activity page (click to enlarge).



Advertise Your Site

Advertise Your Website

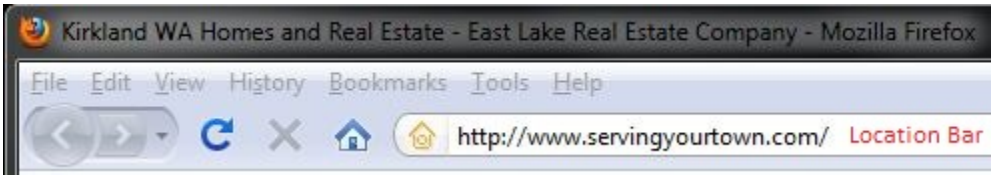
If you have business cards, stationery, print advertising, or are doing your own Internet advertising, include your website address to receive as much traffic from contacts as possible.

To see your personal website address (URL)

This procedure assumes you are already logged into the Market Leader **Admin** panel.

1. In the navigation list, click **Admin**.
2. On the **Website** tab, click the **View your website** link.

3. In the location bar of the browser (e.g. Firefox or Internet Explorer), select the entire contents.

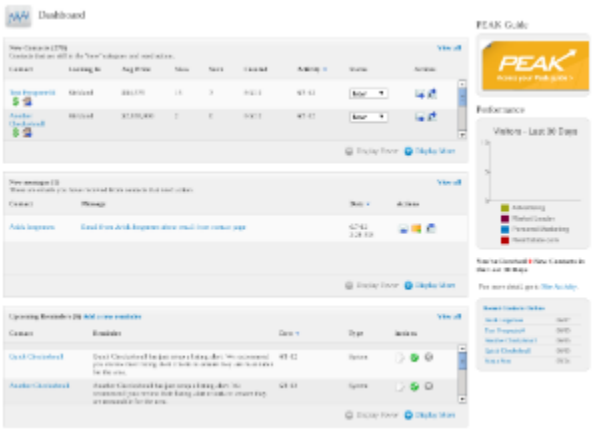


4. Copy the selection to the computer clipboard.
5. Paste the URL into other electronic media.

Agent Dashboard

Agent Dashboard

The **Dashboard** gathers key information about your contacts in one place so you can quickly identify **New contacts**, **New messages**, and **Upcoming Reminders**. The following graphic shows the Dashboard view (click to enlarge).



You can click on highlighted text in lists to access more information about the item. You can click on icons in the lists to perform a given action. By hovering your mouse pointer over the icon, you can get a hint for the action.

New Contacts

The **New contacts** component shows you all contacts with a status of New. Make sure that you are quickly following up with contacts and changing their status. With this component, you can initiate the following actions.

- View Contact Summary
- Change contact Status
- Transfer Contact
- Compose an Email

New Messages

The **New messages** component shows you all the messages that have not been filed. Contacts are waiting for answers to some messages, but other messages might only require filing. After you respond to a message, make sure you file the message. With this component, you can initiate the following actions.

- View Contact Summary
- View Messages
- Compose an Email
- File Message
- Transfer Contact

Upcoming Reminders

The **Upcoming Reminders** component shows you reminders for key tasks that require your attention. With this component, you can initiate the following actions.

- View Contact Summary
- Add a new reminder
- Edit Reminders
- Complete Reminders
- Delete Reminders

Performance and Site Activity

The **Dashboard** view right sidebar includes the following items.

Item	Description
Performance widget	A graph that shows contact activity by advertising source type.
New Contacts total	Enables you to quickly check the number of new contacts you received in the last 30 days.
Recent Contacts Online widget	Shows a snapshot of the contacts that most recently visited your website. Each name in the list is a link to the **Summary** for that contact.
Website stats widget	Provides the following statistics for a consumer website. • Page Views = Rolling 7 day total • Unique Visitors = Rolling 7 day total • Bounce Rate = Lifetime average as % • Return Rate = Lifetime average as %
Website Analytics link	Provides a link to Website Analytics.

My Inbox

My Inbox

The **My Inbox** view contains tools for managing **Messages** and **Reminders** related to contacts. In the **My Inbox** section of the navigation list, you can use the **Webmail** link to access the **Webmail** interface and manage email from non-contacts.

Email Etiquette

The real-estate industry has been labeled as notorious spammers. In order to reduce the chances of your email getting sent to the junk mail box, Market Leader provides standardized email templates that are much more likely to get your message to your contacts. Market Leader provides a WYSIWYG editor for composing and replying-to messages in HTML format. Because some HTML content might trigger spam email filters, Market Leader recommends that you use this feature wisely. If you need to send an attachment, you must use **Webmail**. If a contact does not see your message in their in-box, advise the contact to check their junk mail box.

Messages

Messages

The **Messages** view lists all of the messages that you receive from contacts. You can select one of two modes for viewing the messages, **Not filed** or **Last 25 filed**. To view all messages from a contact, you can view the Contact Summary.

The following procedures assume you are logged into the Market Leader **Admin** panel.

To access Messages

In the navigation list, click **Messages**.

To View a Message

1. On the **Messages**tab, select one of the following modes from the drop-down list.
    - **Not filed**
    - **Last 25 filed**
2. If necessary, scroll to locate a **Message**.
3. Click the subject of the **Message**, *not* the **Contact** name.

To Reply to a Message

In the **Actions** column of the **Message** list, click the **Email Contact**icon ( )

To File a Message

You can remove a message from the **New** message list on the **Dashboard** by filing it. If you work in a team environment, filing helps your manager or team leader know that you handled it.

1. On the **Messages** tab, select the **Not filed** mode from the drop-down list.
2. Locate a **Message** to file.
3. In the **Actions** column of the **Message** row, click the **File Message** icon ( ).

    Depending on your message volume, the filed message appears in the **Last 25 filed** list for a time. You can always view a filed message through the contact summary.

To Transfer a Contact

You can even transfer a contact to another agent or ZIP code from the **Messages** view.

1. On the **Messages** tab, select a mode from the drop-down list.
2. Locate a **Contact** to transfer.
3. In the **Actions** column of the **Contact** row, click the **Transfer Contact** icon ( ).

    The system displays the **Transfer Contact** form.
4. In the form, enter either a ZIP code or an agent email address.

    For ZIP code, Market Leader assigns the contact to an agent in its system who includes the ZIP code in their **Communities Served**.
5. Click the **Transfer** button.

    The system returns you to **My Inbox**.

Reminders

Reminders

To Add a Reminder | To Edit a Reminder

A reminder is a text note with a due date. A reminder can optionally have a contact assigned to it. The **Reminders** view enables you to view, edit, mark complete, and delete reminders in a list. Either you or the system can create a reminder. Market Leader reminders include the following types. You can filter the list by reminder type, date range, and status. The system remembers the filter settings from your last session. You can also sort the list by **Due Date**.

- User
- System
- Birthday
- Anniversary

System reminders appear automatically, for example when a contact saves a listing, and are displayed for three days or until you mark it **Complete**. The system removes incomplete items over three days old from the list. Birthday and anniversary reminders display from 45 days before due until 90 days past due. The following table lists system events that trigger reminders and a suggested action to take for each reminder.

Event	Suggested Action

A contact provides a phone number when signing up.	Call if you have not contacted the contact already.
A contact signs up for a Listing Alert.	Review the listing alert to see if you think the search criteria are realistic. If not, email the contact to explain why the search criteria may not be successful and offer to update the listing alert.
A contact saves a listing.	Contact the contact to see if you can provide additional information about the saved listing.
Another agent transfers a contact to you.	Call or email the contact if you have not already.
Contact birthday or anniversary data is inserted or updated in the Contact Summary.	Optionally, send an appropriate message.

You cannot edit or delete System reminders. The Edit ( ) and Delete ( ) icons are disabled. You can toggle birthday and anniversary status (i.e. complete or incomplete).

User reminders are ones that you create, and they do not expire. They are visible until you complete or delete them. You can remove a reminder from the list by clicking the **Complete**icon ( ) or delete it by clicking the **Delete** icon ( ) . Any reminders associated with a contact appear in the contact summary.

The following procedures assume you are logged into the Market Leader Admin interface.

To Add a Reminder

1. In the navigation list, click **Inbox**.
2. In the **Inbox** view, click **Reminders**.
3. On the **Reminders** tab, click the **Add a Reminder** button.
   The tool displays an **Add a Reminder** form.
4. On the form, enter a **Due Date**. (Required)
   A reminder appears on the Dashboard **Upcoming Reminders** list three days before a due date.
5. Optionally, choose a contact with which to associate the reminder.
   The system suggests a name as you type.
6. Optionally, choose one of the following types.
   - Phone Call
   - Meeting
   - Important Date
   - To-do
   - Note
7. Enter the **Reminder** text. (Required)
8. Click **Save**.

To Edit a Reminder

1. In the navigation list, click **Reminders**.
2. In the **Reminders** list, click the **Edit** icon ( ) for a **User** reminder.
   The system opens an **Edit Reminder** form.
3. Edit any of the fields on the form.
4. Click **Save**.

Webmail

Webmail

Market Leader provides you with a **Webmail** interface for managing all *non*-contact email messages. By contrast, Market Leader system routes all *contact* email messages to the Admin interface to enable integration with its many customer relation management features.

You might find email from a contact in **Webmail**, but only when that contact emails you from an email address you have not yet stored in the Contact Summary. Note to self: capture that address.

To Open Webmail

1. Log into the Market Leader Admin interface.
2. In the navigation list, click **Webmail**.

   The system opens a new browser window or tab with the **Webmail** interface.

To Change Name and Address Options

1. Use the previous procedure to open **Webmail**.
2. In the **Options** pane, click **Change Settings**.
3. To display your name on the **From** line of all messages, enter a name in the **Full Name** field.
4. In the **Signature** text area, enter a signature.

   Consider something like the following.

   ```
   Full Name
   Company Name
   Office phone: (425)555-1212
   Email: username@yourdomain.com
   Website: http://www.yourdomain.com
   ```

5. To save changes, click the **Submit** button.

To Attach Files to Webmail

1. In the **Webmail** interface, click **Compose**.
2. Use the email form to compose the message.
3. At the end of the form, click the **Choose File** button.

   A system File Open dialog box opens.
4. Use the dialog box to find a file.
5. Click the **Open** button to dismiss the dialog.

   The **Webmail** interface displays the file name in the **Attach** area. To attach more files, click the **Choose File** button again.

   You are not finished, yet!
6. To attach the file(s), click the **Add** button.

   Ahhh! Now, you are finished attaching files.

{anchor:toCloseWebmail]

To close Webmail

Click the **Return to Main Page**icon ( ).

Notes and Tips

Webmail limits attachment file size to 8MB.

Normally Market Leader recommends you email contacts using the Market Leader **Admin** interface. However, to send a message with an attachment, you must use **Webmail** because you cannot send attachments from the **Admin** interface.

To see contact email in **Webmail**, click on the **ShownInCRM** folder.

Check **Webmail** everyday and respond quickly to all emails. When you receive a **Webmail** from a contact, and it is not in the **ShownInCRM** folder, that means the **From** address is not yet associated with the contact. To fix that, copy and paste the **From** email address into the Contact Summary, so that Market Leader can automatically associate future emails from that address with the contact.

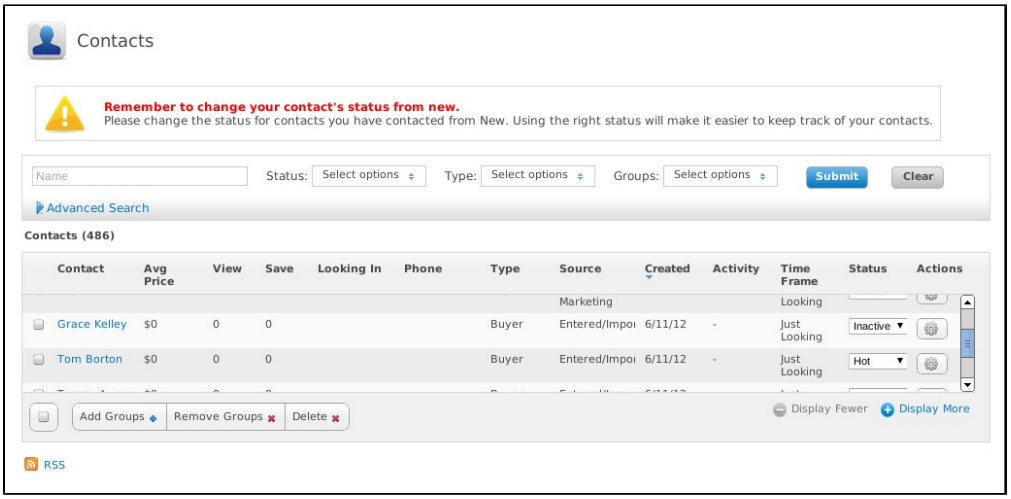
Contacts

Contacts

The **Contacts** view provides a contacts list with multiple filters you can use to refine the list. The list contains an array of information for each contact. Depending on your Market Leader subscription, the head of the contacts list provides the following filters.

- Name
- Status
- Type
- Groups

You can filter contacts by choosing values in any of the drop-down lists. The drop-down lists enable you to select multiple values. The contact list head displays **Contacts (N)** to indicate the number of contacts that match the current filter criteria. You can create more refined filters using Advanced Search. To see more information about a contact, click a contact name. The rest of this topic describes the features of the contact list in more detail.



Contact Type

If the Market Leader product you use includes a consumer website, when a contact signs up for an account on your domain, they can indicate a type (i.e. I am a Buyer). Contacts can select from one of the following core types. If the Market Leader product you use does not include a consumer website, the type field reflects the value provided by the system from which the contact came.

- Buyer
- Seller
- Buyer/Seller
- Investor

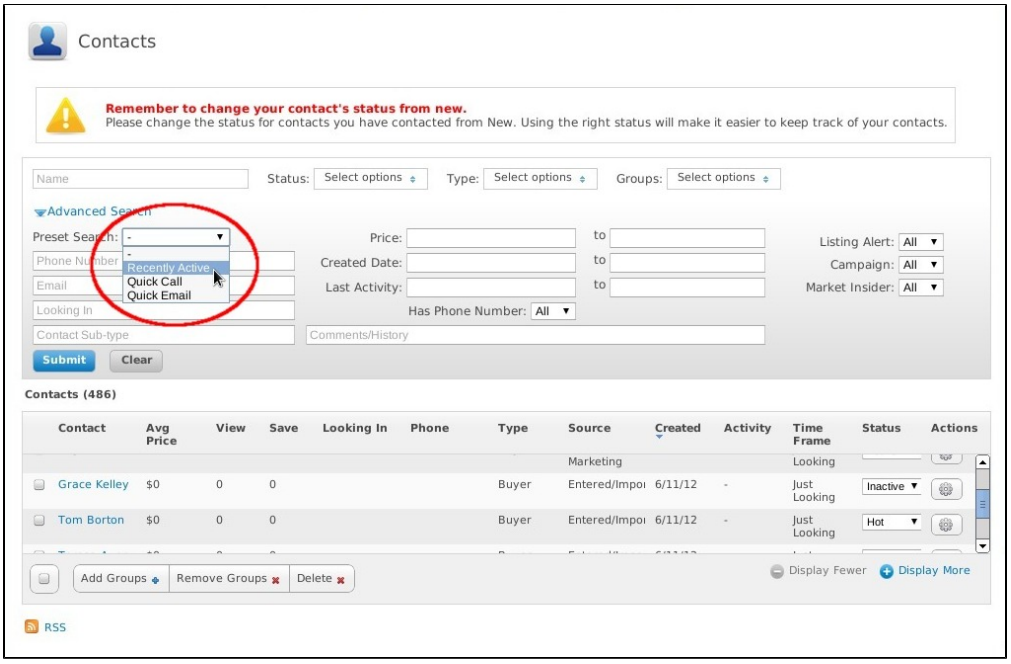
When you add or edit contacts in the Admin interface of your website, you can assign a type value to a contact. Depending on which Market Leader product you subscribe to, in addition to the core types, you can select from one or more the following extended types.

- Renter
- Agent
- Recruit
- Personal Contact
- Vendor
- Other

Market Leader does not include extended types in contact analysis, ICW notifications, website activity metrics, or performance stats.

Recent Activity

Depending on your Market Leader add-ons, you can filter a contacts list to view only recent activity. To filter a **Contacts** list for recently active contacts, click **Recently Active**.



Bulk Actions

The contact list panel provides a bulk action control to perform the following actions on multiple contacts simultaneously.

- Add Groups
- Remove Groups
- Delete

Using basic or advanced search and check boxes, you can filter contacts to a list on which you perform one of the bulk actions.

Delete Multiple Contacts

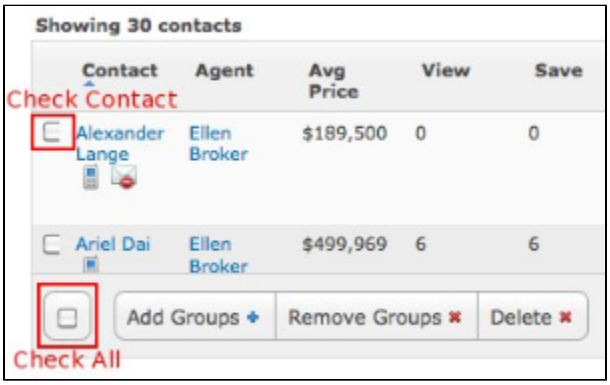
To delete more than one contact at a time, use the following procedure.

1. Log into the Market Leader **Admin** interface.
2. In the navigation list, click **Contacts**.
3. Optionally, filter the contact list using basic or advanced search techniques.
4. Manually select contact check boxes or click the Check All check box in the bulk action control.
5. Click **Delete**.

   Market Leader displays a prompt that explains conditions that might override the delete for specific contacts. For example in order to provide an audit, you cannot delete contacts from a source for which you paid. You also cannot delete contacts that you shared with a lender.

6. When prompted, click **Yes.**

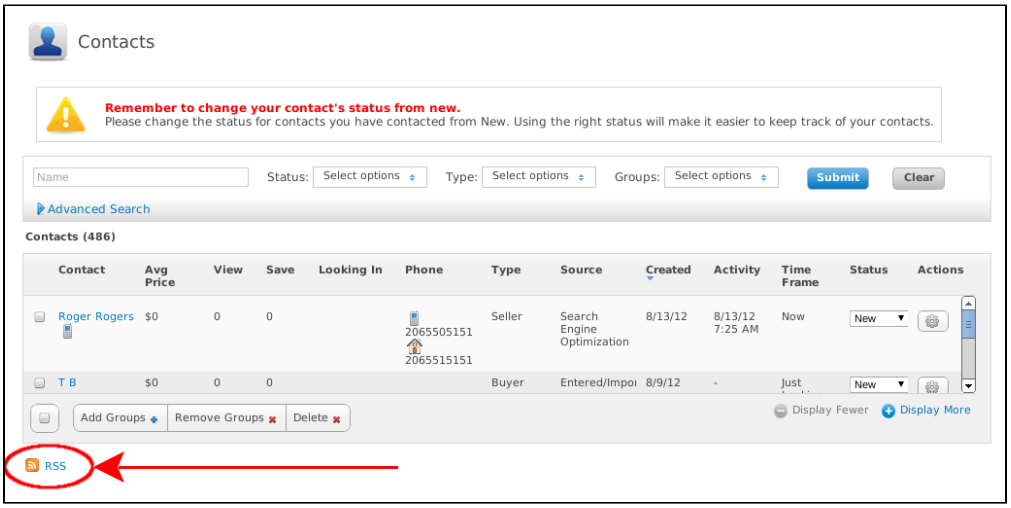
Use a similar procedure to manage group membership. Instead of clicking **Delete**, click **Add Groups** or **Remove Groups**.



RSS

To view an RSS feed of New Contacts and Emails, click RSS. The contacts tool displays an RSS feed which includes contact name and a description of contact activity. You can click a contact name to go to its Contact Summary. If you use a content aggregator, you can subscribe to an RSS feed of your contacts activity from within the rendered feed.

> In some browsers, when you click on **RSS**, the browser might render raw RSS XML source code. Instead of left-click, right-click **RSS** and select Copy Link. Paste the link into your feed aggregator or whatever you use to subscribe to RSS feeds.



To Access Contacts List

1. Log into the Market Leader **Admin** interface.
2. In the navigation list, click **Contacts**.

Contact List

The following tables describe the features of the list.

Depending on which Market Leader product you use, some columns might be hidden by default. If you choose to show a column and your product does not support it, it might contain no data. To see more data, you can upgrade your Market Leader product.

Columns

Label	Description
Contact	Click the name to go to the Contact Summary.
Agent	If your subscription supports it, you can see the agent that is assigned to a contact. Click an agent name to view Agent Profile.
Average Price	Contains the average price of saved property searches for a given contact on your website.
View	Contains the number of individual property listings a contact viewed on your web site.
Save	Contains the number of saved listings for a contact on your web site.
Looking In	The contact is looking for a home in this city or town.
Phone	Save up to three phone numbers for a contact and be able to quickly distinguish home, cell, and work phones.
Type	Indicates the type of contact, either buyer, seller, or both.

Source	Indicates the channel through which the contact came into the system.
Created	The date a contact signed up on your website or when you added the contact to your account.
Activity	The last time a contact visited your website. If this date is given as a time of day, the visit occurred within the last 24 hours. If it is a date, then the visit occurred more than 24 hours ago.
Time Frame	The contact time frame to buy a home. When a contact registers on your website, they are asked when they intend to buy. The choices are **Now**, **1-3 months**, **3-6 months**, **6+ months**, or **Just looking**.
Status	Where the contact is in the home buying process. To change the status for a contact, click in the **Status** drop-down list and choose a a status type.
Actions	Shortcuts you can click to email a contact or transfer a contact to another agent in the Market Leader system.

Icons

Depending on which Market Leader product you use, some icons and their associated functionality might not apply to you.

Icon	Tool Tip	Description
	Transfer Contact	To transfer the contact to another agent, click the icon and follow the on-screen instructions. At this time contacts can only be transferred to other agents with Market Leader accounts.
	Email Contact	To send an email to a contact, click the Email Contact icon and follow the on-screen instructions.
	This contact's phone number is ### - ### - ####	Displayed if the contact provided a phone number. Move the mouse over the icon to see the phone number. The phone number also appears on the Contact Summary.
	This contact has requested a mortgage preapproval.	This contact requested information on mortgage pre-approval when signing up.
	This contact was sent to the Lender.	After requesting mortgage pre-approval, the contact has been linked with a lender.
	This contact has # listing alert(s).	The contact receives listing alerts.
	This contact's email is NOT working.	The contact email address has not passed our email validation process and does not appear to be a working email address.
	This contact is unsubscribed. OR This contact is Unsubscribed and Email is NOT working.	The contact has unsubscribed from automatic system email and listing alerts, OR the contact unsubscribed AND their email is not working.
	This contact is looking to sell a house.	The contact indicated that they would like to sell a house.
	The call center has added comments for this contact	If you subscribe to First Call (Business Suite only), this icon appears when you have a new comment from the call center concerning a contact.

	The call center has flagged this contact for immediate contact	If you subscribe to First Call (Business Suite only), this icon appears when you have a new call from the call center and a contact requests that you call them back immediately.

See Also

- Status
- Manage Groups
- Finding and Adding Contacts

Status

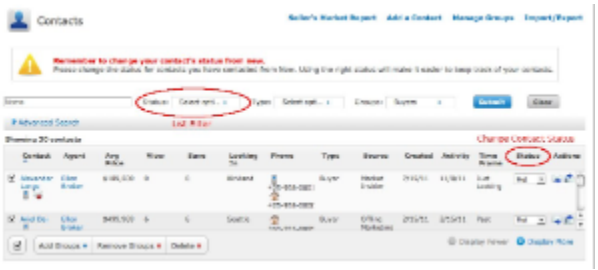
Status

In the Market Leader system, a contact has a status value that enables you to manage and view them in groups. A contact has one of the following status values.

- New
- Retry
- Active
- Inactive
- Hot
- Sold
- Trash

The first time you open the **Contacts** view, the contact list shows New contacts by default. If you change the status type in the view, the system remembers the last type you viewed the next time you view the contacts list.

You can change the status of a contact as often as you want. Keeping the contact status up to date helps you focus on the contacts who need your attention and who are most likely to become clients. Good use of status helps you save time and prioritize your tasks.



The following procedures assume that you are logged into the Market Leader **Admin** interface, and you opened the **Contacts** view by clicking **Contacts** in the navigation list.

To View Contacts of one Status

1. Click the **Status** list filter.
2. In the **Status** option list, select a status.

To Change the Status of a Contact

1. If necessary, scroll and use display controls to find a contact.
2. In the row of the chosen contact, click the **change contact status** drop-down list.
3. In the option list, select a new status type.

Notes

- When you change a contact status and the **Status** list filter is any value other than All, the contact disappears from the list when you change the status.
- With the exception of Trash, changing contact status does not delete, unsubscribe, or change the contact information in any way.

Built-in Status Type - Agent

Built-in Status Type - Agent

The following table shows the status types, for use by agents, that are built into Market Leader . For information on how to define a custom status type, see Custom Status Type - Agent.

Status	Definition
New	Contacts who just registered and that you have not responded to yet.
Retry	Contacts you are trying to engage but have yet to respond to your emails or phone calls.
Active	Contacts who are engaging with you and your site but may not be ready to buy right now. This list generally includes people who are contacting you with questions by email as well as long-term contacts who are receiving listing alerts and therefore do not need to be proactively contacted at present.
Inactive	Contacts who are not responsive or not interested.
Hot	Contacts who are working with you to buy a home
Sold	Customers who have completed the sale or purchase of their home
Trash	Contacts who ask to stop receiving email, unsubscribed themselves, or have no valid phone number or email address. Use this status very rarely or not at all. A contact marked as Trash will be automatically removed from automatic emails and listing alerts.

Do not put contacts into trash because they stopped coming to the website, provided a fake name, or said they already have an agent. It is a very common mistake to mark all old contacts as Trash. When an agent does this, contacts that are set up for listing alerts, for example, will have their alerts deleted. This may cause you to miss out on a transaction when the contact starts actively looking for homes a few weeks or months later.

Custom Status Type - Agent

Custom Status Type - Agent

Market Leader does not support integration of custom status types with the built-in status types. If you would rather use a custom status type, you can use a workaround.

Custom Status Workaround

The concept of this workaround is to use a consistent set of terms in **Contact Summary Comments**, such that you can search for them, and the search returns all contacts whose comments contain a given term. In preparation for using this workaround, define a set of custom status terms (e.g. Serious, Just Looking, etc.) and document them (e.g. note-to-self) for future reference. To make the workaround as robust as possible, use the terms consistently. A copy and paste would be ideal. With this workaround the contact categories are unlimited.

The Performance Evaluator page uses built-in status types. If you use status types differently, the data in the Performance Evaluator view might not be useful to you.

Market Leader recommends that you use the built-in Status types. For definitions of the built-in types, see Built-in Status Type - Agent.

The following procedures describe steps for using the workaround and assume that you are logged into the Market Leader **Admin** interface and have navigated to a Contact Summary view.

To Use Custom Status Type

1. In the Contact Summary, click the **Comments** bar.
2. In the **New Comment** field, enter a custom status term as previously defined.
3. Click the **Save** button.

To Find Contacts of a Custom Status Type

1. In the Contacts view, click **Advanced** next to the **Find Contact** button.

   The view displays a form for entering multiple search criteria to find a contact.

2. In the **Comments/History** field, enter a custom status term.
3. Click **Find Contact**.

The system returns a list of contacts whose comments contain the customer status term. When using the **Advanced Find Contact**, the system searches **All** status types.

See Also

- Summary Comments
- Agent Dashboard

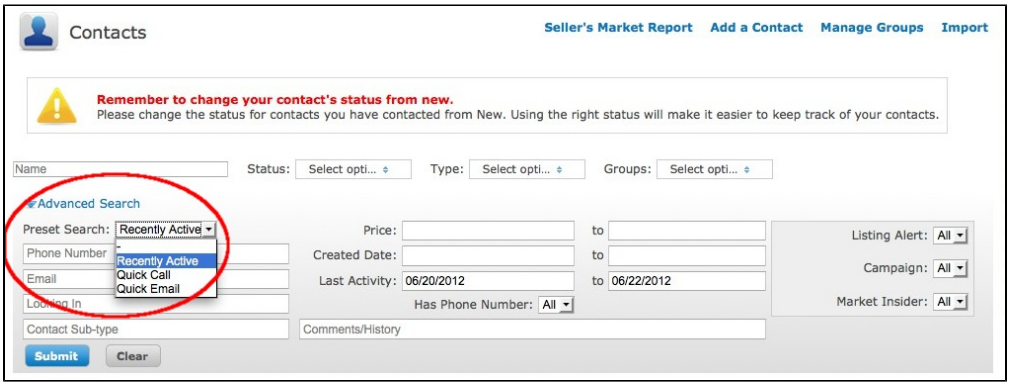
Recent Activity

Recent Activity

Market Leader provides preset filters in Advanced Search that show recent activity by contacts on your consumer website. Preset searches are defined as follows. Check these searches daily, and reach out to each of these contacts as soon as possible.

Preset Search	Definition
Recently Active	Last Activity within the previous 48 hours
Quick Call	Last Activity within the previous 48 hours AND Status = Inactive or Trash AND Has Phone Number = Yes
Quick Email	Last Activity within the previous 48 hours AND Has an email address AND Status = Inactive or Trash AND Has Phone Number = No

Anyone who is coming back to the website is worth your attention. If you are not already working with all of them, try to contact them. As a general rule, every contact that shows up in these searches should be given status of Retry or Active.



To View Recent Activity

This procedure assumes you are logged into the Market Leader **Admin** interface.

1. In the navigation list, click **Contacts**.

2. If necessary to expand the Advanced Search panel, click **Advanced Search**.
3. In the Preset Search control, click one of the following options.
    - Recently Active
    - Quick Call
    - Quick Email

Market Leader displays a list of contacts matching the preset criteria.

> Try to make contact with all of these contacts and then change their status to Retry, Active, or Hot, depending on their response.

See Also

- Status
- Contact Email

Initial Contact Wizard (ICW)

Initial Contact Wizard (ICW)

The ICW is a streamlined guide for contacting new contacts. When you receive a new contact, the Contact Summary view displays a notification.

When a contact signs up on your site the system sends a welcome message to the contact with login information so that the contact can return to the site and view their saved information. It is up to the agent to make first contact after a contact signs up. ICW is a user friendly resource for helping you make that first contact with your new contact.

Why Use ICW

Successful contact-agent relationships are based on rapid responses to contact needs. When a contact signs up for an account on your system, they probably have questions. Market Leader recommends that you respond to new contacts within 12 hours to answer those questions. ICW not only helps you meet contact needs by answering questions but also sends an automatic email, in your name, if you are unable to send it yourself.

What ICW Provides

- Step by step instructions about how to make an initial contact phone call
- Pre-written emails tailored to the contacts needs
- A backup system in case you are not able to contact your new contact within 12 hours

How ICW Works

ICW correlates contact actions on your site and creates a custom message for you to use when making first contact. It gives you a tested and proven edge that increases the probability that the contact returns to your site. For example, if the contact has not set up listing alerts, the ICW message encourages them to create a listing alert. The message also includes listing suggestions based on their searches and information on your site.

How to Use ICW

This procedure assumes that you are logged into the Market Leader Agent Dashboard of the **Admin** interface. When a new contact signs up on your site, the Agent Dashboard displays their name in the **New contacts**list.

1. Click the name of a New contact.

   The system displays the Contact Summary view. The view includes a notification that provides an ICW link.
2. Peruse the **Summary**, **Listings**, and **History** tabs to learn about listings the contact viewed, their **Timeframe** and other responses.
3. After reviewing the Contact Summary, click the **Open the ICW** link.
4. Click the link to the ICW and follow the on-screen instructions.

If the contact provided a phone number, ICW displays call scripts and suggested next steps. Market Leader recommends you contact them by phone. Phoning is the fastest and most direct way to make contact.

5. If they do not answer the phone, choose an appropriate followup step.

   If they did not provide a phone number, ICW displays a form email. Usually, you do not have to edit the message, but verify its accuracy and helpfulness based on what you know about the contact from perusing the summary. You can add or remove listings and make minor text edits to match contact requirements. Based on experience, top performing agents recheck every message and send them as soon as they can.
6. To send the email, click the **Send** button.

If you do not use the ICW within 12 hours of the contact **Created** date and time, Market Leader sends the message automatically.

Market Leader recommends that you contact at least 90% of your contacts within 12 hours. Market Leader calculates your response time across all your new contacts and reports it in Performance Evaluator.

See Also

- Contact Summary

Contact

Contact

When you view a list of contacts (e.g. on the Agent Dashboard) and click a contact name, the system directs you to the named contact view.

The contact view contains valuable information on each contact grouped by the following tabs.

- Summary
- Listings
- History

The Summary tab includes the following information about the contact.

- Reminders
- Comments
- Emails
- Group memberships
- Market Insider activity
- Personal and other information

The Listings tab includes the following.

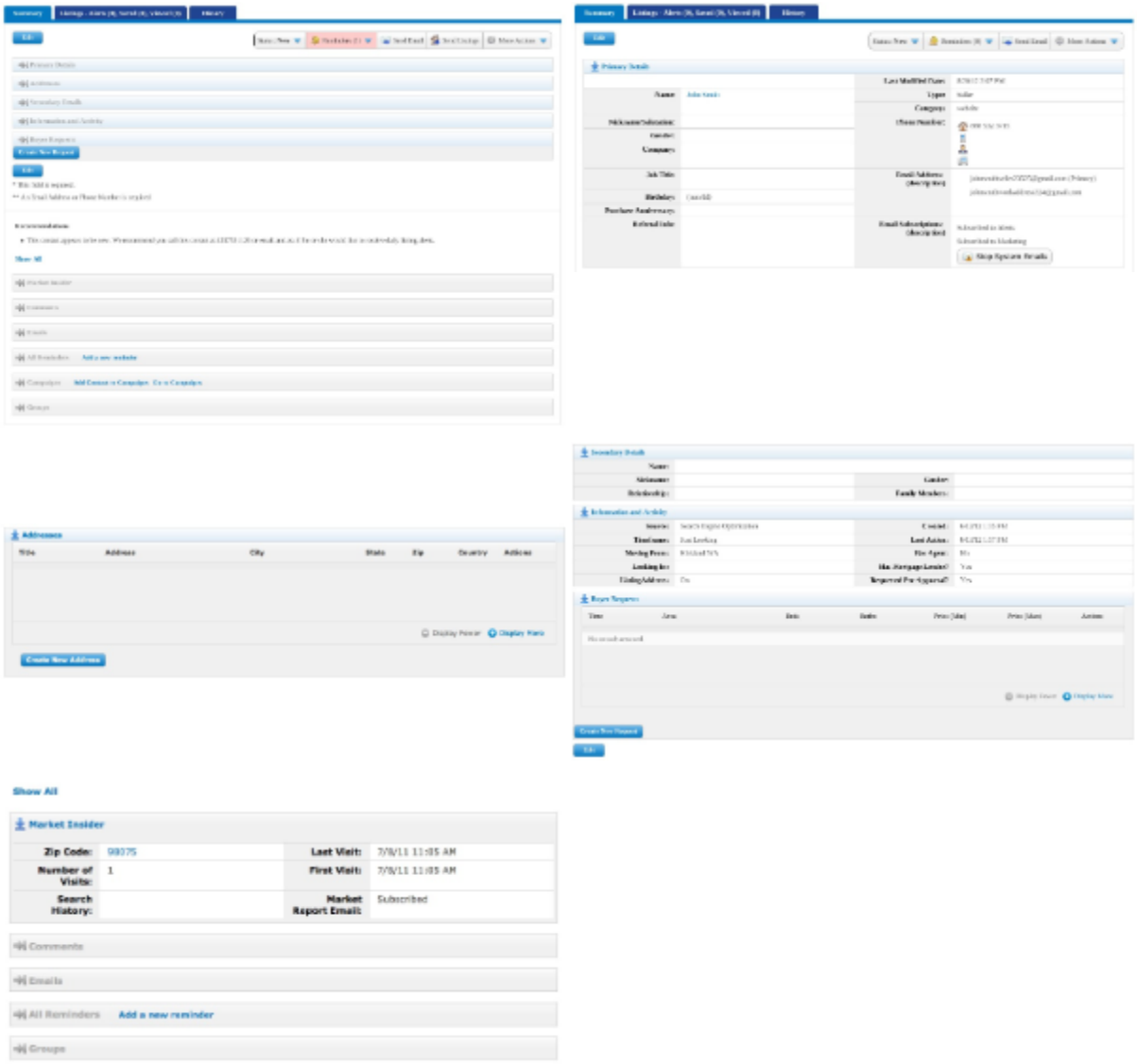
- Listings the contact has viewed
- Listings the contact has saved
- Listing alerts set up for the contact

The History tab shows a log of system activity for the contact (e.g. when they signed up or were transferred to you).

Contact Summary

Contact Summary

When you click the name of a contact in the Market Leader **Admin** interface, the system displays a contact **Summary** view. The **Summary** view contains the basic information for a contact. The following gallery contains images of a contact summary.



To Access a Contact Summary

1. Log into the Market Leader **Admin** interface.
2. In the navigation list, click **Contacts**.
3. To locate a contact, use the contact list or the **Find Contact** feature.

   To use the list, set the list filter, scroll, and use display controls to find a contact. To use the **Find Contact** feature, enter a name in the text box and click the **Find Contact** button.
4. In the contact list, click a contact name.

Wherever you see a contact name in a list, you can click it to go to the contact **Summary**.

See Also

- Summary Fields
- Summary Actions
- Summary Comments
- Summary Emails
- Summary Buyer Requests
- Initial Contact Wizard (ICW)
- Seller's Market Report
- Send Seller's Market Report

Summary Fields

Summary Fields

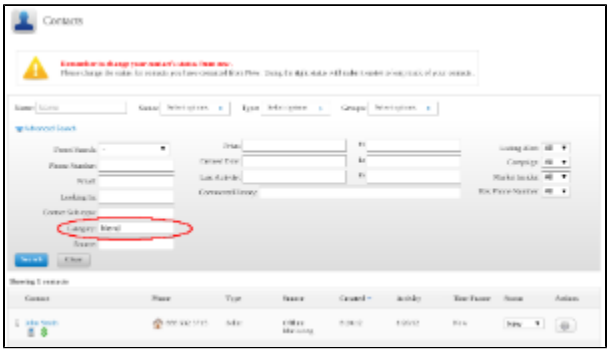
This topic describes the fields included in a Contact Summary. A contact summary divides the fields into the following categories.

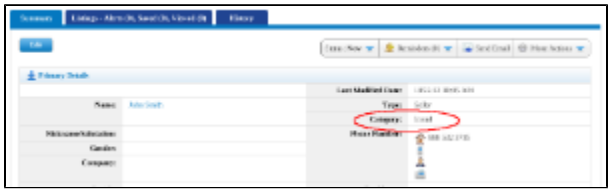
- Primary Details
- Addresses
- Secondary Details
- Information and Activity

A contact summary includes a contact name and a subtitle that characterizes the contact activity on your website. A subtitle includes what a contact is looking for, including location, average price, and number of bedrooms and bathrooms. The rest of this topic describes the fields in a Contact Summary as they are grouped in the view.

Primary Details

The **Primary Details** panel includes fields for names, dates, contact information, referral information, contact type, and category. The category field is a text field in which you can enter any text value. Using Advanced Search in Contacts, you can search for category values. Advanced search also supports search by Source.





The **Email Subscriptions** field indicates contact preferences for receiving alerts and system emails. The following table shows email preference values and their meanings.

Preference Value	Description
Subscribed to Alerts	Alert notifications are enabled for a contact.
Unsubscribed from Alerts	A contact opted out of receiving alert notifications.
Subscribed to System Emails	System emails are enabled for a contact.
Unsubscribed from System Emails	A contact opted out of receiving system emails.

> As used in the **Email Subscriptions** field, the term *subscribed* only indicates a preference. It does *not* indicate whether a contact has any currently configured alerts. For more information, see Add New Listing Alert.

Addresses

The **Addresses** panel enables you to save multiple addresses for a contact. When you create a new address for a contact, Market Leader displays an **Add Address** form. The form marks required fields with an asterisk. In addition to required fields, the form provides the following optional fields.

- Mailing Address
- Property Type
- Beds
- Baths
- Square Feet
- Overall Condition
- Lot Size / Acreage
- Basement

- Parking Type

- Parking Spaces
- Year Built
- Style of Home
- Neighborhood or Development
- Number of Fireplaces
- Date of Home Listing
- Owner Comments
- Estimated Value (read-only)
- Transaction Status

- Planning to Sell
- Pool
- Resident Status
- Relationship with property
- Heat Type
- Air Conditioning Type
- Home Sale Price
- Commission Earned
- Date of Home Sale

When a contact requests an HouseValues.com estimate, Market Leader adds an address record to the contact with an address title *HouseValues Lead*. If an estimate includes information from public records, the public records information appears in an Estimated Value field of the address. You cannot edit Estimated Value information. Estimated Value might include any of the following data.

- Home Value Estimate
- # of Bedrooms
- # of Bathrooms
- Square Footage
- Lot Size / Acreage
- Type of Property

- Year Built
- Pool
- Overall Condition
- Style of House
- Heat Type
- Air Conditioning Type

Secondary Details

The **Secondary Details** panel enables you to save information about a significant other to a contact and other family members of a contact.

Information and Activity

The **Information and Activity** panel contains information provided by a contact or generated by the Market Leader system including the following.

Source	This indicates how the contact entered the system. For example, the contact might sign up on your website after following a link from Craigslist or you might use the import process to add the contact to your account.
Timeframe	On a registration form, contacts indicate how soon they are looking to buy: "Now," "1-3 months," "3-6 months," "6+months," or "Just looking."
Moving From	This is where the contact is from, not necessarily where the contact is looking for property. This comes from information provided on a registration form.

Looking In	This is where the contact is looking for property. The system calculates this based on the contact searching behavior.
Listing Addresses?	This option is only available in some areas, based on your MLS. Depending on the Listing Address configuration on your website, this contact may or may not be able to see listing addresses. You can override your website setting for a specific contact by editing the **Summary**.
Created	This is the date the contact signed up on your website (or the day you added the contact to your account).
Last Action	This is the most recent date and time the contact visited your site.
Has Agent?	New contacts can indicate whether they are already working with a real estate agent, and the response appears here. We recommend responding to contacts even if they signal that they are already working with an agent. The contact may be unhappy with the service their agent is providing and you could have the opportunity to help. Contact the contact and simply ask about the situation.
Has Mortgage Lender?	If your brokerage or team has a lender as part of the Market Leader account, this indicates whether the contact is working with *your* lender or not.
Requested Pre-approval?	If a contact requests a mortgage pre-approval when they sign up, you see it here.

See Also

- Summary Actions
- Summary Comments
- Summary Emails
- Summary Market Insider

Summary Actions

Summary Actions

A **Summary** view enables you to take actions with respect to a contact. The following table provides a description of actions you can perform from a Contact Summary view. The table lists the actions in order of flow in the view.

Action		Description
Edit		To edit a Contact Summary 1. Click **Edit**. 2. Make changes to contact summary fields. 3. Click **Save**. If a contact signs up with one email address, but emails you from a different address, Market Leader routes the message to **Webmail**. Save the new email address in the Contact Summary. Saving the email address enables the system to associate future emails from that address with the contact. See also Finding and Adding Contacts.
Status		Using the drop-down list, select a different status for a contact.
Reminders		Click to view all reminders for a contact or to add a new reminder
Send Email		Click to open a Compose Messageform.
Send Listings		Click this to launch an MLS search, from where you can select and send listings to the contact.
More Actions	Add New Listing Alert	Opens a dialog box to configure a new alertfor a contact.

	Transfer	To transfer the contact to another agent 1. Click Transfer. 2. Follow the on-screen instructions. 3. Click the Transfer button. Contacts can only be transferred to other agents with Market Leader accounts.
	Print	To print the contact contact information, click Print
	Export V-Card	To export the contact contact information as a V-Card, click Export V-Card The Export V-Card action saves the v-card file in your browser download folder. Most browsers have a Downloads menu command that provides a shortcut to downloaded files.
	Resend Welcome Email	Resends the email that was sent to a contact when they first registered.
	Delete	Click to delete a contact from the system. This action opens a dialog box for you to confirm the action.
Name		In **Primary Details**, click a contact name to open a new window with an Internet white page search on the name.
Stop System Emails		The Stop System Emails action provides a toggle switch to activate or deactivate automatic Market Leader emails. For more information, see Unsubscribe Contact.
Address Actions		For existing addresses in the **Addresses** panel, using the respective icons, change address attributes ( ), delete an address ( ), or toggle the **Mailing Address** attribute ( ).
Create New Address		Opens an **Add Address** dialog for a contact.
Show All		Expands the **Comments**, **Emails**, **All Reminders**, and **Groups** panels. Clicking any of the titles toggles between an expanded or collapsed display of the respective panel.
Comments		To see all comments that you have written about this contact, or to add comments, click on the **Comments** panel. If your team or brokerage is working with a lender, you and your lender can share comments by checking the share comments box. See also Summary Comments
Emails		To see Contact Email 1. Scroll to view the **Emails** panel. 2. Click the **Emails** panel. 3. To view the full text of a message, click the message excerpt. 4. To reply to a message, in the **Emails From Contact** pane, click the **Email Contact** icon( ) See also Summary Emails and Contact Email.
All Reminders		To see all reminders 1. Scroll to view the **All Reminders** panel. 2. Click in the **All Reminders** panel. See also Reminders.
Reminder Actions		In the **All Reminders** panel of the bottom block in the view, using the respective icons, change reminder criteria ( ), complete a reminder ( ), or delete a reminder ( ).
Groups		Use this panel to manage which groups a contact belongs to.
Market Insider		Use this panel to view how a contact uses Market Insider tools on your consumer website.

Summary Comments

Summary Comments

The **Summary** view includes a **Comments** panel for recording notes on your interaction with a contact. The following graphic shows the **Comments** panel with its list of **Comments** and a **New Comment** entry form. You can use comments to record anything that happens with a contact that is not automatically documented in the system. You can enter notes on phone calls or copy and paste emails sent from another email address. The system automatically captures the date and the time of each comment, so you do not have to enter that information. The more information you record for a contact, the easier it is for you to maintain the relationship. Contacts sometimes stop using your website for a time and then come back later. If you record comments, you have a complete record of interaction with the contact, which you can use to refresh your memory.

Click

To View Comments

1. Log into the Market Leader **Admin** interface.
2. In the navigation list, click **Contacts**.
3. Find a contact.
4. Click the name.
5. In the contact **Summary**, scroll to view the **Comments** panel.
6. If necessary, click in the **Comments** panel to expand it.

Notes

If your team or brokerage has a lender on the system, you can share comments with them by checking the **Share this comment with Lender** check box.

If you subscribe to First Call, the Market Leader call center notes are in the contact **Summary Comments**.

You can use Comments to group and search for contacts. For more information, see Custom Status Type - Agent.

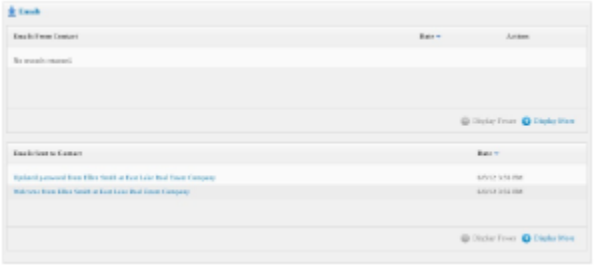
See Also

- Contact Summary
- Status
- For Lenders: Share Comments

Summary Emails

Summary Emails

The Summary view includes an **Emails** panel for viewing messages exchanged between you and a contact. The following graphic shows the **Emails** panel with its **Emails From Contact** and **Emails Sent to Contact** panes. The system maintains copies of all email correspondence, with one exception. That exception is automatically generated Listing Alerts, where due to high volume, the system only maintains the previous 60 days of listing alerts sent to a contact.



Email sent to a contact or received from a contact, using the Market Leader system, is automatically stored in **Summary Emails**. These emails cannot be deleted.

Email received from or sent to a contact might *not* be displayed in the Emails panel for the following reasons.

- The message was sent from an email address other than one associated with the contact. In this case the system does not recognize that the message is from a contact and routes it to Webmail. You can edit a contact email address or add a secondary email address, so in the future the system can associate it with a contact. Contacts can have up to three email addresses associated with an account.
- The message was sent to a contact from an email address *not* associated with the Market Leader system.

Summary Market Insider

Summary Market Insider

The Contact Summary view includes a **Market Insider** section. The **Market Insider** section captures information about a contact use of the **Market Insider** tools on your consumer website. This section includes the following information.

- Last **Market Insider** ZIP code search by a contact
- List of all ZIP codes searched by a contact
- Total number of visits to a **Market Insider** page by a contact
- Dates of first and last visits to a **Market Insider** page by a contact
- Market Insider email preference for a contact

> You can click the **Zip Code** to open a **Market Insider** report for that ZIP code before calling a contact. The report opens in a new browser tab or window.

Market Insider Emails

The system sends monthly **Market Insider** emails to a contact under the following conditions.

- A contact is *not* unsubscribed from listing alerts.
- A contact has searched at least one ZIP code for a **Market Insider** report.

The system sends the first email two weeks after a contact registered on the site. Monthly **Market Insider** emails commence from the two week anniversary.

The email contains a link that enables a contact to return to the site and be logged in automatically.

Sign Up Contact

The Market Insider panel includes controls to edit a **Zip Code** and to toggle **Market Report Email** status for a contact. To change Zip Code or Market Report Email, use the following procedure.

1. Log into Market Leader Admin interface.
2. In the navigation list, click **Contacts**.
3. Using the contact search tools, find a contact.
4. In the contact list, click a contact name.

5. In a contact Summary, click **Market Insider**.
6. In Market Insider panel, click **Edit**.

   The panel refreshes so that **Zip Code** and **Market Report Email** are editable.

7. Edit the values the way you want.
8. Click **Save**.

Summary Buyer Requests

Summary Buyer Requests

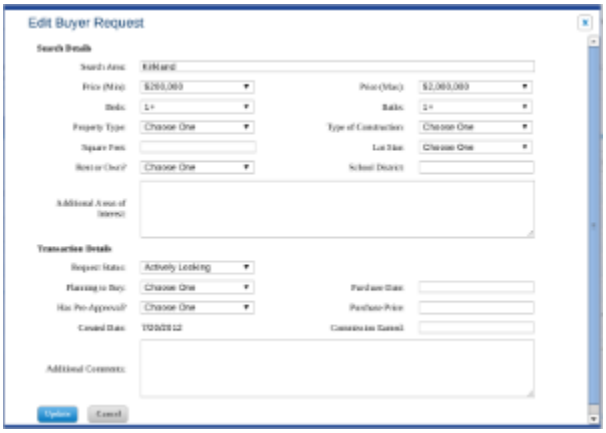
This topic describes the Buyer Requests feature in a Contact Summary view. A contact summary includes a grid showing an overview of property profiles for which a buyer has requested information through justlisted.com, and property profiles that an agent has manually created on behalf of a buyer. The grid includes the following columns.

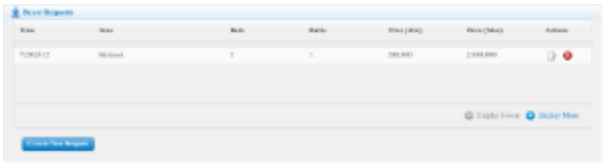
- Time
- Area
- Beds
- Baths
- Price (Min)
- Price (Max)
- Actions

On justlisted.com, when a contact answers questions that characterize their ideal home purchase, Market Leader captures those answers as a Buyer Request and sends the contact a *Thank you* email with your picture and contact details. If you subscribe to the area, you receive an email notification, and Market Leader adds the request to an existing contact, or if no matching contact exists, creates a new contact. You can view a copy of a *Thank you* email in Summary Emails.

You can manually enter Buyer Requests using a **Create New Request** button.

To subscribe to an area, contact Customer Support.





Using Buyer Requests

The Buyer Requests grid enables you to add, view, edit, or delete a request. Before you begin any of the following procedures, Log into the Market Leader **Admin** interface..

Manage Requests

1. In the navigation list, click **Contacts**.
2. Using search filters, find a contact.
3. Click the contact name.
   Market Leader displays a contact summary.

4. Scroll to view **Buyer Requests** grid.

Add a Request

1. Click **Create New Request**.

   This opens an **Add Buyer Request** form.

2. Complete form fields as needed.

At least one **Search Area** is required.

3. Click **Add**.

View or Edit a Request

1. For a specific request, click **Edit**.
2. This opens an **Edit Buyer Request** form.

3. View and edit fields as needed.
4. Click **Add** or **Cancel** to save or discard changes, respectively.

Delete a Request

> ⚠ You cannot delete requests generated by Market Leader.

1. For a specific request, click **Delete**.

   This opens a confirmation dialog.

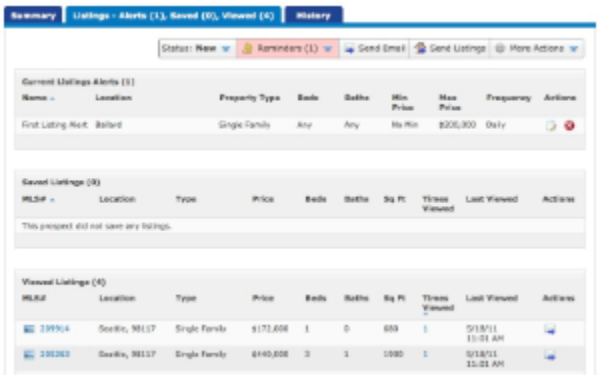
2. Click **Yes**.

Contact Listings

Contact Listings

The Contact **Listings** view shows **Current Listing Alerts**, **Saved Listings**, and **Viewed Listings** for a contact. In addition, it provides action buttons to **Send Listings** and to **Add New Listing Alert**. Listing alerts notify contacts of new MLS listings that match their search criteria. When a contact sets up a listing alert, the Market Leader system automatically posts a reminder in your account.

Click



To View Contact Listings

1. Log into the Market Leader **Admin** interface.
2. In the navigation list, click **Contacts**.
3. In the contacts list, click a contact name.
4. Click the **Listings** tab.

⚠ If a contact has saved a listing that is no longer on the market, the listing icon is grayed out (!Icon Graphics^disabledListing.gif!).

How to Use Listings View:

In the **Listings** view, you can see listings a contact has saved or viewed (sorted by date). This view enables you to observe, analyze, and ultimately help a contact. Market Leader recommends contacting the contact and offering to show or provide additional information about the listings. The **Viewed Listings** information helps you gauge whether a contact is seriously looking for a home. For example, a contact might be consistently looking in one area, or always at a specific price range, or always looking at listings with a specific feature. Search consistency can signify that a contact has real interests and may be a valid customer. Conversely, random searches for million-dollar estates, trailer parks, land, commercial buildings, etc. might signify a less than serious home buyer.

Times Viewed

In addition to being able to see which listings a contact has viewed, you can see how many times a contact viewed a particular listing. In the **Times Viewed** column for **Viewed Listings** and **Saved Listings**, click the number to see a list of the dates that the contact viewed that listing.

Peruse a contact **Viewed Listings** to understand what homes seem to be of interest to the contact, especially before using the Initial Contact Wizard (ICW) or sending recommended listings.

See Also

- Add New Listing Alert

Add New Listing Alert

Add New Listing Alert

A listing alert is an automatic email notifying a contact of new listings that match search criteria that the contact provides. One can configure an alert to be sent daily, bi-weekly, or weekly. The Contact Listings view provides a button to add a new listing alert for a contact. Listing alerts are designed to keep your contacts coming back to your website frequently. Market Leader has found that the more contacts you have who receive listing alerts, the more returning visitors you have to your website. The more returning visitors you have, the more likely you are to get a phone call when a contact finds his or her ideal home.

The system features encourage a contact to sign up for listing alerts, but Market Leader highly recommends that you review contact summaries to ensure they opt into listing alerts *and* that the alerts are reasonable for the area.

Unless you have explicit contact permission, *do not* set up alerts for a contact. The system might send emails as frequently as every day, and if the email is not requested, you might be seen as a spammer and lose the opportunity to work with the contact.

The following procedures assume you are logged into the Market Leader **Admin** interface with the Listings view open.

To Add New Listing Alert

1. On the **Listings** tab, click the **Add New Listing Alert** button.
2. On the **Add New Listing Alert** form, choose the appropriate criteria.

   At least one **Area** is required.
3. Click **Add Alert**.

To Delete an Alert

1. If necessary, scroll to view the **Current Listings Alerts** pane.
2. In the **Current Listings Alerts** pane, click the Delete icon ( ) for a given alert.

To Edit a listing alert

1. If necessary, scroll to view the **Current Listings Alerts** pane.
2. In the **Current Listings Alerts** pane, click the Edit icon ( ) for a given alert.

Due to volume, the system only records the previous 60 days of listing alerts sent to a contact.

Send Listings

Send Listings

The contact **Listings** view provides the **Send Listings** button to help send recommended listings to a contact. The system might suggest some recommended listings, or you can search your MLS to suggest listings.

Recommended listings are listings that match contact viewing behavior but that the contact has not yet viewed. The recommended listings are based on the following criteria.

- The average price of the homes the contact has viewed.
- The most common areas the contact has looked in.
- The types of properties (e.g. residential, land, etc.) the contact has viewed.

The Initial Contact Wizard (ICW) also uses the recommended listings.

To Send Listings

To send listings, you can use two different paths within the Market Leader **Admin**interface.

- Contact (i.e. Admin > Contacts > Contact > Send Listings).
- Search MLS (i.e. Admin > Search MLS > Send Listings).

Both paths use the **Search MLS** view, but one automatically addresses the email to a contact, while the other requires that you choose to whom (one or more contacts) the message is sent. The following procedures describe each path in detail. They assume you are logged into the Market Leader **Admin** interface.

Choose a Path

- Contacts
    1. In the navigation list, click **Contacts**.
    2. In the contact list, click a contact name.

       The system displays a tabbed view of a contact with the following tabs.
        - Summary
        - Listings
        - History
    3. Click the **Send Listings** button.

       The system displays a **Recommended Listings for** *Contact Name* view with a **Search Options** form and map.
- Search MLS
    1. In the navigation list, **Search MLS**.

       The system displays a **MLS Search** view with a **Search Options** form and map.

Search for Recommended Listings

1. In **Search Options**, specify at least one city, neighborhood, or ZIP in the **Areas** input field.
2. To filter the search, specify more search criteria.
3. Click the **Search** button.

   The system displays the results as markers on the map and in list form following the map. To expand or collapse the map, you can use controls at the bottom of the map. To preview control functions, hover over the mouse pointer over the controls.
4. In the search result list, click the **Add to Selected Listings** icon ( ) for each listing you want to recommend.

   For each selected listing, the system displays an MLS number above the **Search Options**. You can perform more searches, continue to select and add listings, and delete listings until your list is ready to send.
5. When the list is complete, click the **Send Selected Listings** button.

   The system displays the **Send Listings** email form.

Prepare and Send Email

1. Review the **Subject** and change if necessary.
2. Depending on which path you chose (i.e. Contact or Search MLS), provide **To**values.
    - Contact path
        a. Select one or more of the contact email addresses by clicking the corresponding check box(es).
    - Search MLS path
        a. In the **To** field, enter one or more (comma separated) contact names.
3. Optionally, select a preferred greeting.
4. Optionally, using the **Select a message** drop-down list, select a different message template.

    If you added a custom template that you prefer, you can choose it here. Otherwise, the default message text is probably the most appropriate of the built-in choices.
5. Optionally, in the text area, manually edit the message text.
6. Click **Send**.

    The system displays a success information message.
7. Click **Close**.

    The system returns you to the previous view.

When you email recommended listings to a contact, the listings are not removed from **Recommended Listings** list until the contact views the listings on your website.

See Also

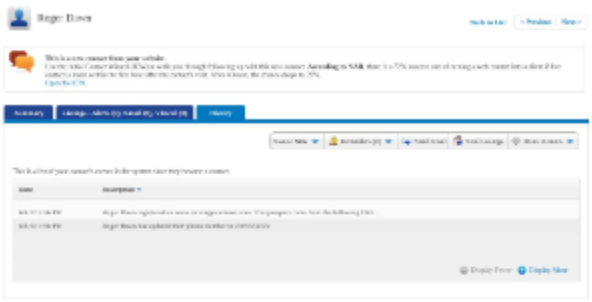
- Contact Summary
- Search MLS
- Email a Listing

Contact History

Contact History

The **History** view contains a list of events recording contact activity within the Market Leader system. The following graphic shows the **History** view (click to enlarge).

Click



Contact Email

Contact Email

Contact email is any email correspondence between you and one of your contacts as compared with email between you and someone who is a colleague or Webmail. The system saves copies of messages received from or sent to contacts so you can view the entire history of email between you and a contact in the Contact Summary. You can send a message to or reply to a message from a contact anywhere you see the **Email Contact**icon ( ).

New Messages from Contacts

When a contact emails you, the message first appears on the Dashboard in the New messages and at the top of the My Inbox Messages view. The system automatically recognizes when an incoming message is from a contact. When you file the message, the system stores it permanently in the Contact Summary.

The New messages list shows email messages that require attention. After you attend to these emails, remember to file them.

The following procedures assume you are logged into Market Leader **Admin** interface.

To File Message

Use one of the following options.

- In any message list, click the **File Message** icon ( ) associated with the message.
- In the **Reply to Email Message** form, Click **yes** on the option to **file this message upon sending**.

To See All Contact Messages

1. Click a contact name in any list of contacts.

   This opens the Contact Summary.
2. If necessary, scroll to view the **Emails** bar.
3. Click anywhere on the **Emails** bar to open the **Emails** view.

   The system displays two lists, **Emails From Contact** and **Emails Sent to Contact**.

To Send Contact Email

Because timely communication is central to your success, the system provides many locations from which to send email to contacts. To send contact email, use one of the following methods.

- To compose a message to a contact, click the **Send Email** icon ( ) on a Contact Summary tab or click the **Email Contact** icon ( ) in any contact list.
- To Reply to Email Message from a contact, click the **Email Contact** icon ( ) in any messages list (e.g. New messages or Emails from Contact).
- To send an email with listings, in the Contact Summary view, click the Send Listings button.
- To send automatic emails about new listings to a contact, in the Contact Listings view, click the Add New Listing Alert button.

Any email message that you send to a contact from the site automatically contains your contact information by appending your Email Signature to the message.

Sending and Replying to Email

On both the Compose Message and Reply to Email Message views, a Select a message dropdown (Fig. 3) contains templates with pre-written text that you can use. Some messages are provided for you, and you can add messages that you want to save for future use.

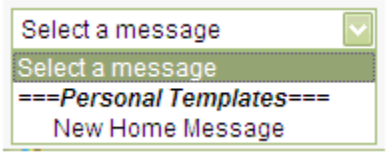


Figure 3 Message template dropdown

Clicking the title of a message template will not send the message. It only loads the selected text into the typing area. You can edit the text before sending the message.

Compose Message

Compose Message

When you click the **Send Email** icon ( ) on Contact Summary tab or click the **Email Contact** icon ( ) in any contact list, the system renders the **Compose Message** form. This form includes a HTML WYSIWYG editor to support custom formatting of the messages you send. To compose and send a message to a contact, use the following procedure.

The following procedure assumes you are logged into the Market Leader Admin interface and have the **Compose Message** form open.

To Compose and Send a Message

1. In the **Subject** field, enter the subject of the message.

   The form requires a subject.

2. On the **To** line, check one or more contact email addresses to receive the message.
3. In the salutation drop-down list, choose an appropriate greeting.
4. Optionally, in the message template drop-down list, select a message template.

   If you select a template, the system pastes it into the message text area.
5. In the message text area, make any changes required.

   Some templates have placeholders for pasting a link. Be sure to replace any placeholders or edit the message appropriately to not include the intended replacement.
6. After proof reading the form, click the **Send** button.

   The system returns you to the previous view and posts an information alert telling you, "Your email was successfully sent."

Reply to Email Message

Reply to Email Message

When you click the **Email Contact** icon ( ) in any message list, the system renders the **Reply to Email Message** form. This form includes a HTML WYSIWYG editor to support custom formatting of the messages you send. To reply to a contact email, use the following procedure.

The following procedure assumes you are logged into the Market Leader **Admin** interface and have the **Reply to Email Message** form open.

To Reply to an Email Message

1. In the **Subject** field, make any necessary changes.

   By default, the system populates the subject field and no changes are required, but you can override the suggested subject. Do not leave it blank. Subject is required.
2. On the **To** line, check one or more contact email addresses to receive the message.
3. In the salutation drop-down list, choose an appropriate greeting.
4. Optionally, in the message template drop-down list, select a message template.

   If you select a template, the system pastes it into the message text area.
5. Optionally, click the checkbox to **Include original message**.

   If checked, the system pastes the original text at the end of the text in the text area.
6. In the message text area, make any changes required.

   Some templates have placeholders for pasting a link. Be sure to replace any placeholders or edit the message appropriately to not include the intended replacement.
7. Optionally, click the radio button to say **yes** to **file this message upon sending**.

   This is usually a good idea. You can always find the message in the Contact Summary.
8. After proof reading the form, click the **Send** button.

   The system returns you to the previous view and posts an information alert telling you, "Your email was successfully sent." If you opted to file the message, the system also posts, "Message filed successfully."

First Call - Agents

First Call - Agents

Market Leader provides the **First Call** service. When you sign up for the service, Market Leader calls all new contacts that provide a phone number within 20 minutes of the contact logging in. The Market Leader operator asks the contact a series of questions and enters comments for you about the contact.

In the contact lists, in both the Dashboard and the Contactviews, there are icons below the contact name if the call center has new comments for you. Contacts with a call center immediate contact icon ( ) next to their names have requested an agent follow up with them immediately, and those with a call center icon ( ) should be called, by the agent, as soon as possible for a follow up conversation. Market Leader also posts a notification of new comments at the top of the Contact Summary.

Market Leader saves all comments by its staff in Summary Comments.

Finding and Adding Contacts

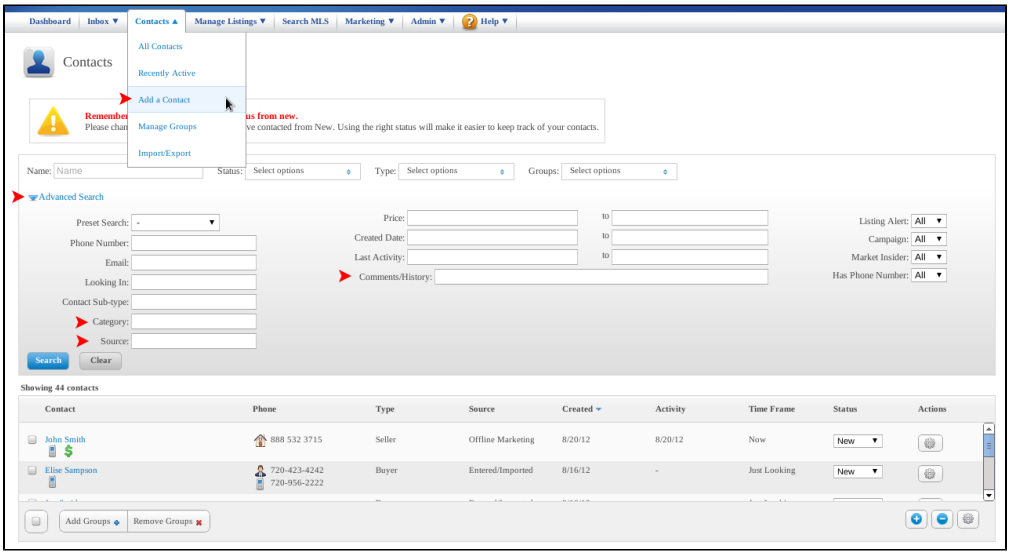
Finding and Adding Contacts

The Contacts view provides tools to find contacts and to manually add contacts. This topic describes steps to search contacts and add contacts to the system. The following procedures assume you are logged into the Market Leader **Admin** interface with the Contacts view open.

> Market Leader removes manually added contacts from the Referral Network.

For a quick tutorial on how to manually add a contact, watch the following video.

Add a Contact



To Find Contacts

By default, the **Contacts** view provides a basic contact search form that enables you to find contacts by name, status, type, and groups. The form includes an **Advanced Search** option that enables you to search on additional contact fields such as phone, email, comments, and history.

To search, use one of the following options.

- To Use Basic Search
  1. In the contact search form, enter or select a value for one or more of the following.
     - Name or partial name in the text input box.
     - Status
     - Type
     - Groups
  2. Click **Submit**.
- To Use Advanced Search
  1. In the contact search form, click **Advanced Search**.
     The form expands to include additional search criteria inputs.
  2. Enter or select values to refine the search.
  3. Click **Submit.**
- To clear all search criteria, click **Clear**.

When you submit search criteria, the system returns a list of contacts with names matching the specified values.

Advanced Search Tips

- New fields! Search by **Category** and **Source**.
- Use the **Comments/History** field in **Advanced Search** as a custom status type workaround.
- Campaign "Yes" returns users **currently** on active campaigns, not if they were ever on a campaign.

To Add a Contact

You can manually add contacts to the system to give them access to the listings on the website, to set them up for Listing Alerts, and to track their activity on the consumer website.

To add a contact, use the following steps.

1. Click **Add a Contact**.
   Market Leader displays a form to enter contact information.
2. Enter the required information.
   Market Leader requires a name and at least one of the following.

   - Email Address
   - Physical Address
   - Phone Number
3. Optionally, provide additional form values.
4. Click **Save**.
   Market Leader automatically generates login credentials for the contact to sign into the consumer website and appends it to the welcome email.

See Also

- Logging in
- Contacts
- Contact Summary
- Status
- Custom Status Workaround
- Consumer Website
- Import Contacts
- Referrals

Manage Groups

Manage Groups

The **Manage Groups** view enables you to create labels by which you can filter contacts in the Contacts view. The following graphic shows the Manage Groups view. To enlarge the image, click the thumbnail.

The following procedures assume you are logged into the Market Leader **Admin** interface.

To Manage Groups

1. In the navigation list, click **Contacts**.
2. In the Contacts view, click **Manage Groups**.

   The system displays the Manage Groups form and a list of currently configured groups.
3. In the **Create New Groups** text box, enter a group name.
4. Click **Save**.

   The system adds the new group name to the list.

To Use Groups

Use groups to filter the contact list.

1. In the Contacts view, click the **Groups** drop-down list.
2. Click a check box next to one or more group names.
3. Click away from the drop-down list.

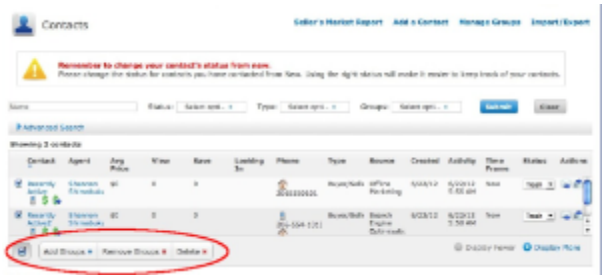
   The system filters the contact list to show only users that are members of the selected groups.

To Populate Groups

1. In the Contacts view, click the check box next to one or more contact names.

Alternatively, scroll to view the end of the list and click the check box adjacent to the add and remove groups control. This selects all contacts in the list that belong to you.

2. If necessary, scroll to view the **Add Groups +** | **Remove Groups x** control.



3. To add selected contacts to one or more groups, click **Add Groups +**.
4. To remove selected contacts from one or more groups, click **Remove Groups x**.
5. In the pop-up list, click a check box for one or more groups.
6. Depending on the control, click **Add** or **Remove**.

Import Contacts

Import Contacts

If you have a list of contacts that you want to add to your Market Leader account, you can import the list in CSV format. You can use the following procedures to import contact data from a CSV file. For Business Suite or Professional users, please see your broker or team leader to use this feature.

> ⚠ Market Leader removes imported contacts from the Referral Network.

Import Requirements

- Data formatted correctly in a CSV (comma separated values) file, so that data is included in the expected order.
- Market Leader requires a first name, last name, and email address for each contact.

- The CSV file must include all fields, even if empty, in the order specified on the **Contacts Import** page. See the following example layout.
- You can import a maximum of 15,000 contacts over the lifetime of your account.
- You can import a maximum of 5,000 contacts per import.

To import contacts, use the following steps.

1. Log into the Market Leader **Admin** interface.
2. In the navigation list, click on **Contacts**.
3. In the action links, click **Import/Export**.

4. On the Import Contacts tab, select the settings to assign to each imported contact.

   To avoid confusion, it might be helpful to clear out your existing **New** contacts and use the **New** type for the imported contacts. Each imported contact receives an email that includes instructions on how to log into and use your website. You can edit the wording of this email.
5. Using the **Import File Type** drop-down, specify the format of the file you want to upload.
6. By clicking **Browse**, select an upload file.

7. Click **Import**.

Example CSV Import Data Layout

The following lines show an example of the **Custom CSV** layout and *minimum* data requirements. For more information on Outlook, Top Producer 8i, and My Red Tools formats, see their respective documentation. Every field for a given import format must contain a value even if it is an empty value (two quotation marks enclosing zero characters). Each value must be enclosed in quotation marks. The last line shows an example of a record that includes all data values.

✅ Importing contacts might require some trial and error. The import process might be sensitive to the type of data in each column (e.g. numerical or alpha). Experiment with a single line file before attempting to upload a file with a gazillion contacts, until you verify that the upload works with the file format and data formats you want to use. If an import fails, the system notifies you and does not add the contact record. If necessary, you can easily delete a single contact to conduct more trials. Use the experimental file to verify the format of your gazillion contact file and adjust data entries accordingly.

✅ Upload files are plain text files which you can edit in a simple text editor such as Notepad (Windows) or TextEdit (Mac). We do not recommend using fancy word processing applications to edit an upload file, as they might introduce extraneous characters in the file.

⚠ The import process is sensitive to the number of values in each line of an import file. Only change data values. Do not change the number of values in a line. In other words, be very careful not to add or remove field separators (i.e. commas for CSV).

```
"Rogelio","Francisco","","","","","","","","","","","","","","","","rogelio@example.com","","",""
"Rosario","Francisco","","","","","","","","","","","","","","","","rosario@example.com","","",""
"FirstName","LastName","(206) 555-1212","206-555-1313","206 555 1414","123 Main","Totem
Lake","WA","98034","125 Main","Totem Lake","WA","98034","127 Main","Totem
Lake","WA","98034","firstlast@marketleader.com","fnln@yourdomain.com","fnln@domainyo.com","What, me
worry?"
```

See Also

- Referrals

Export Contacts

Export Contacts

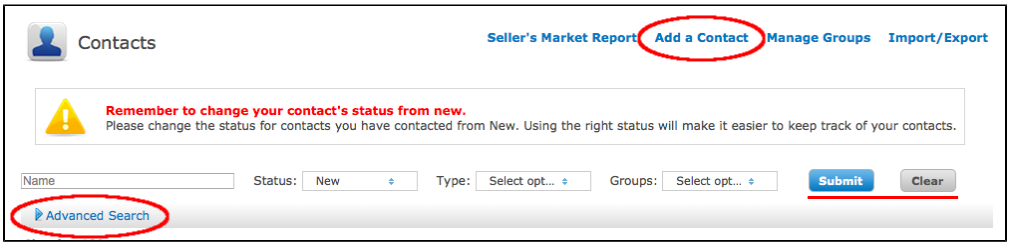
When you want to use contact data in another format (e.g. in a spreadsheet), you can use the following procedure to export contact data to a CSV file.

⚠ If you have a large number of contacts, you might want to export each status type separately.

To Export Contacts

1. Log into the Market Leader **Admin** interface.
2. In the navigation list, click **Contacts**.

   The following graphic shows the **Import/Export** link in the **Contacts** view.



3. In the action links, click **Import/Export**.
4. Click the **Export Contacts** tab.
5. In the **Contact Status** drop down list, select the appropriate status type.
6. Click **Export**.
7. When the browser prompts you, depending on what you want to do, either save or open the .CSV file.

Example CSV Export Data Layout

The following is an example of exported CSV data. You can open a CSV file with a text editor or spreadsheet application. The CSV export

includes a row for the data headings.

```
"First Name","Last Name","Home Phone","Work Phone","Cell Phone","Primary Email Address","Email
Address 2","Email Address 3","Moving From","Looking In","Average
Price","Status","Date","Agent","Primary Email Working","Email Working 2","Email Working 3","Has
Agent","Requested Pre-Approval","Has Mortgage Lender","Has Listing Alerts","Total Properties
Viewed","Timeframe","Source","Address 1","City 1","State 1","Zip 1","Address 2","City 2","State
2","Zip 2","Address 3","City 3","State 3","Zip 3","Address 4","City 4","State 4","Zip 4","Address
5","City 5","State 5","Zip 5","Registered From Agent Site"
"Andy","Test","","","","fake@housevalues.com","","","","Monroe","341283.33","Hot","9/10/10 10:14
AM","Ellen
Smith","Yes","No","No","No","No","No","Yes","5","Past","Entered/Imported","","","","","","","","","","
WA","","","Hot","8/23/10 1:04 AM","Ellen
Smith","Yes","No","No","No","No","No","No","15","Past","Offline
Marketing","","","","","","","","","","","","","","","","","","","","","","No"
```

Export Messages

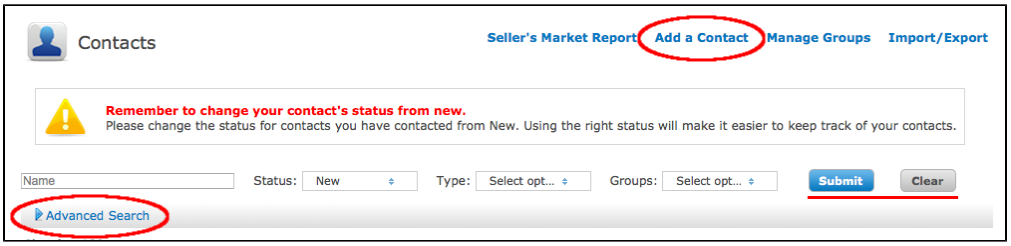
Export Messages

When you want to use message data in another format (e.g. in a spreadsheet), you can export messages exchanged between you and your contacts to a CSV file.

For large contact lists, you might want to export messages for each contact status as a separate file or limit the date range you export. For Business Suite and Professional users, please see your site owner (broker or team leader) to export messages.

To Export Messages

1. Log into the Market Leader **Admin** interface.
2. In the navigation list, click on **Contacts**.
3. In the action links, click **Import/Export**.



4. Click the **Export Messages** tab.

   The **Export Messages** text includes a description of the fields and order of the exported data.
5. In the **Contact Status** drop down list, select a status type.
6. Click the **All Time** or **Choose a date range** radio option.

   For the Choose a date range option, enter valid dates in the From and To fields.
7. Click **Export**.
8. If the browser prompts you, depending on your preference, choose to save or open the CSV file.

Unsubscribe Contact

Unsubscribe Contact

A contact can unsubscribe from listing alerts or all system emails on the **My Tools** page of the consumer website. A contact can also choose to re-subscribe in that same location.

If a contact unsubscribes from listing alerts, they no longer receive listing alert emails. If a contact unsubscribes from system emails, they no longer receive the following.

- Listing alerts
- Listing alert sign-up reminders
- **Email a Listing** messages you might send to a group of contacts

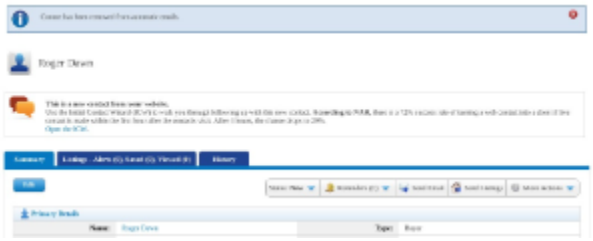
The contact is still able to view listings and send email to you, and you can manually send emails to the contact. If a contact verbally or electronically requests to not receive system emails, then you must fulfill the request. As an agent you have the ability to stop system emails.

To Stop System Emails

1. Access the contact summary.
2. In **Primary Details**, **Email Subscriptions**, click **Stop System Emails**

   The system no longer sends the following.
   - Listing Alerts
   - Listing Alert Sign-up reminders
   - Email a Listing group emails

The following graphic shows how the notification appears at the top of the Contact Summary view after you select the **Stop System Emails** option.



This action stops Automatic Emails and deletes any existing listing alerts.

You always have the option to restart system emails. As long as the contact has not unsubscribed via the My Tools section of the website, they begin receiving emails again from the system.

See Also

- Contact Summary
- Add New Listing Alert

Tools for the Seller

Tools for the Seller

Contacts looking to buy might also require tools for selling a property they own. When registering on your website, a contact can check a box that indicates they have a property to sell. The Market Leader system provides the following tools for the seller.

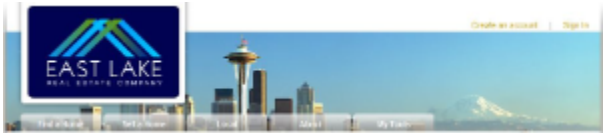
- Send Seller's Market Report
- Market Status Report

If your team or brokerage is participating in the Referral Network and a potential seller home is not located in your area, the contact may be referred to another real estate agent in the Market Leader network. If this occurs, you are notified in the Contact Summary.

Market Status Report

Market Status Report

When a contact lists a home with you, they can sign into the consumer website and view a **Market Status Report** which shows real-time listing activity. The seller needs the MLS number of the listing to see the Market Status Report. The seller can see a list of contacts who viewed the listing and various other tools to monitor listing performance. The following graphic shows the consumer **Sign In** link (click to enlarge).



To Access Market Status Report

1. On consumer website, contact clicks **Sign In**.

   The system redirects them to the last page they viewed on the website.

2. If necessary, contact clicks the **Sell a Home** tab.

3. In the **Property #** input text box of the **Marketing Campaign Report** pane, contact enters the MLS#.
4. Contact clicks **View report**.

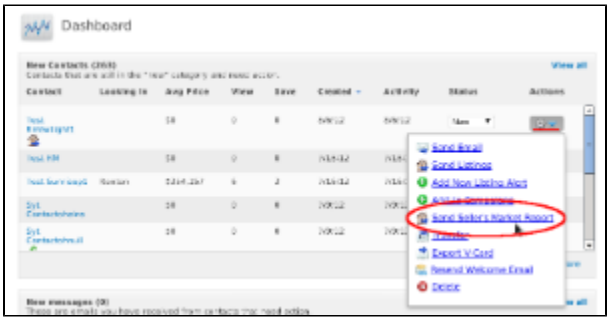
See Also

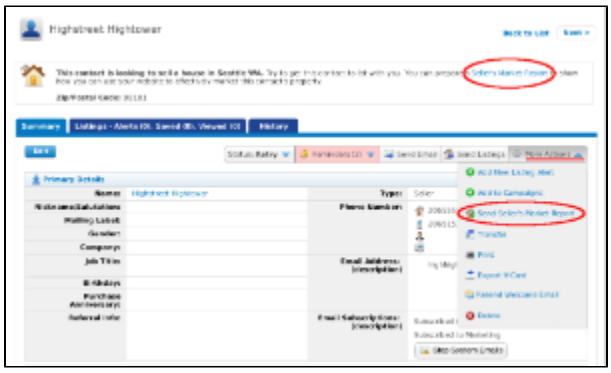
- Manage Listings
- Referrals

Send Seller's Market Report

Send Seller Market Report

A Seller Market Report indicates what a property might be worth to a contact and how many contacts you know that might be interested in a property. When you make a listing presentation, you can generate and include a **Seller Market Report**. The report helps inform a seller of the tools you have to market their property via the website. You can create the report as an email or printable document. It can show a potential home seller the exact number of contacts in your database who have recently been looking for similar homes, and explains that you can market the home directly to relevant contacts. You can access this feature from a Contacts view or a Contact Summary view. To generate the report, you enter basic property information and search for other listings to include in the report as comparable.





To Send Report

This procedure includes the following high level steps.

- Enter Report Specifications
- Select listings.
- Review and print/send report.

The following procedure assumes you are logged into the Market Leader**Admin** interface with the Contacts view open.

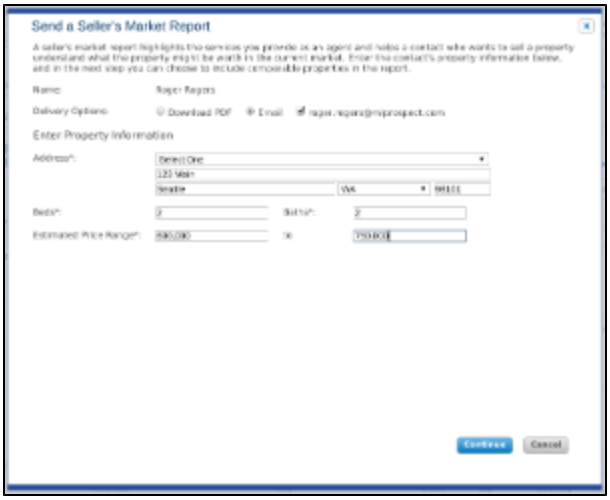
Enter Report Specifications

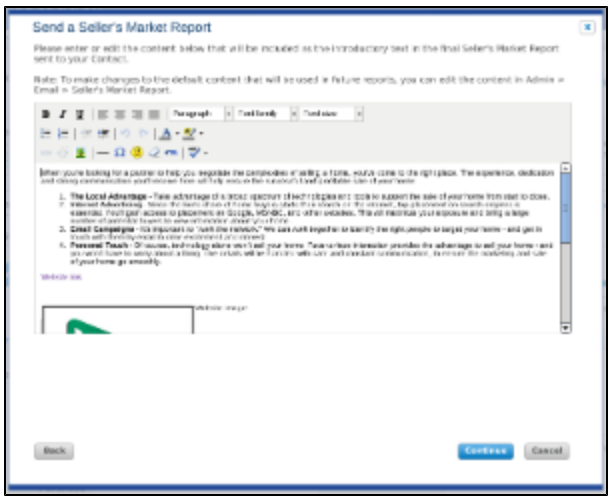
1. Click **Seller Market Report**.
   This opens a **Send a Seller Market Report** form.
2. Choose a delivery option.
   If you chose email, verify or enter a contact email. A Seller Market Report email does not count against your monthly marketing email limit, and you can deliver it to any contact, even if they have opted out of system-generated emails.

> ⚠ The report recipient must be a contact in your Market Leader system.

3. In the property information form, enter the required values.
4. Click **Continue**.

5. In a subsequent screen, you can customize the default Seller Market Report content for a specific report. You maintain the default text under Admin in the navigation list, on the Email tab, Seller Market Report template.
6. Click **Continue**.



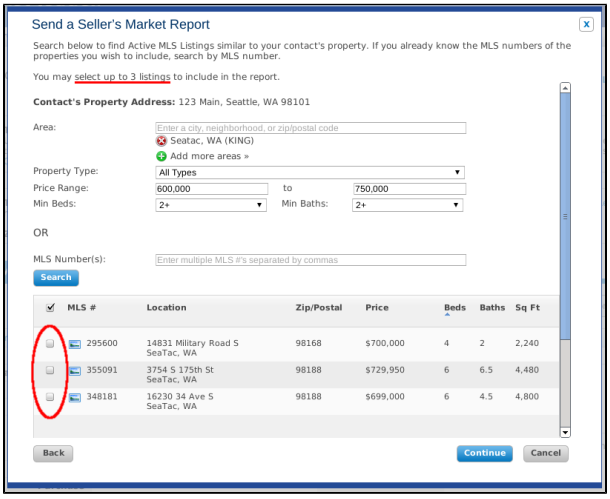


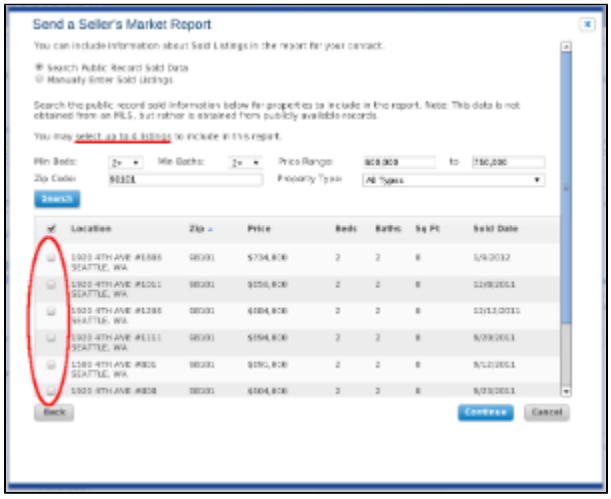
Select Listings

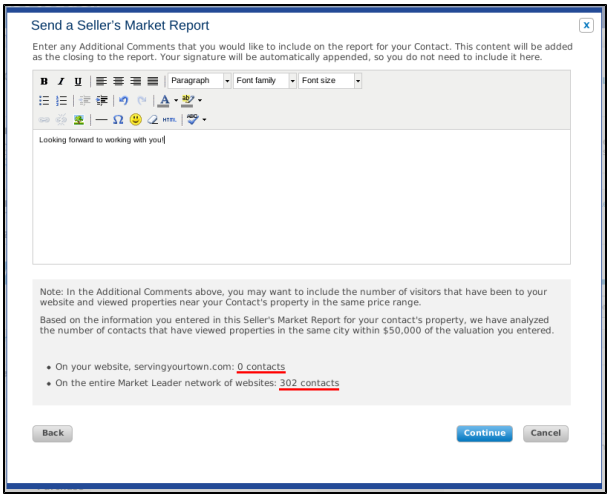
1. Depending on your Market Leader subscription, select listings to include with the report.
   You can include active and sold listings in a report. You search for and select listings from within a form. You select active listings on one form and sold listings on a subsequent form.

> Essentials Edition does not include MLS integration, so if you subscribe to Essentials Edition, you do not see this option.

2. Click **Continue**.
3. Add any additional comments you might want to include with the report. Depending on your subscription, you might see that Market Leader provides statistics on the number of your site, and network, visitors interested in similar properties. They are provided here as optional information that you might want to mention in the comments.
4. Click **Continue**.

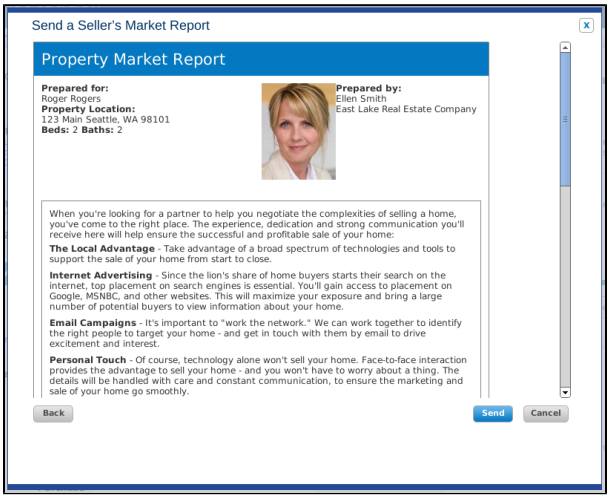


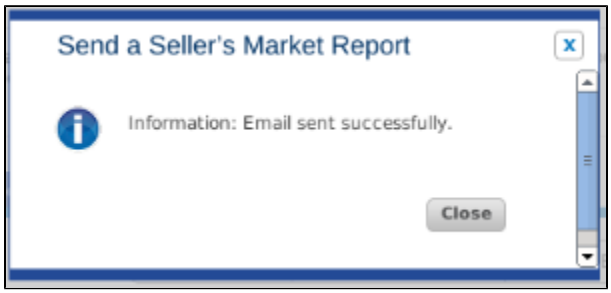




Review and Print or Send

1. Review the report.
2. If you want to change anything, click **Back**.
3. When finished reviewing, click **Send**.
4. When Market Leader displays a success notification, click **Close**.





See Also

- Manage Listings
- Referrals
- Seller's Market Report

Manage Listings

Manage Listings

In addition to finding great listing matches for each contact, you also want to promote individual listings. Market Leader provides a number of ways for you to do this. In the **Manage Listings** view, as the following graphic shows, you can manage and review listing promotion activities. (click image to enlarge)

To use this feature, you must enter your Agent MLS ID in Settings. In order to see listings in the **Manage Listings** view, you must have

listings associated with your Agent MLS ID.

To Manage Listings

1. Log into the Market Leader **Admin** interface.
2. In the navigation list, click **Manage Listings**.

The **Manage Listings** view includes the following tabs.

- **All Listings**

  Shows a list of every property in the MLS database associated with an MLS ID, including a summary of the listing and actions to view associated emails or to send a listing email.
- **Email to Contacts**

  Shows when promotional email was sent to contacts for a particular listing. You can see the number of contacts who received the email, how many visited the site, and how many requested information on the listing.
- **Post on Craigslist**

  Shows all listings and whether or not you posted a listing on Craigslist. If you posted a listing on Craigslist, the system provides data on that post. This view provides a tool to create a new Craigslist post.

Send at least one email for every new listing. To achieve the broadest impact, be conservative when removing contacts from the email list.

See Also

- Send Listings

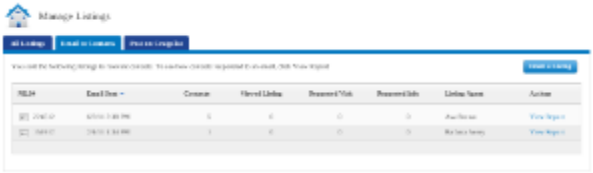
Email a Listing

Email a Listing

You can email listings under your MLS# to prospeects using one of the following methods.

- **Email Listings** link in the actions column of the **All Listings** tab.
- **Email a Listing** button under the **Email to Contact** tab.

The following graphics show the **All Listings** and **Email to Contact** tabs.



If there are no listings associated with your MLS#, or you have not entered an MLS# into your profile, the **All Listings** list contains no listings. If you have not sent any listings, the **Email to Contacts** list contains no listings.

The email listings procedures include the following high level steps.

- Choose listing.
- Choose contact(s).
- Edit and send message.

To Email Listings

If you want to see all of your listings, you can use the **All Listings** tab. If you want to see which listings you have already sent, you can use the **Email to Contacts** tab. Both tabs provide a control to email a listing.

Choose listing

1. Log into the Market Leader **Admin** interface.
2. In the navigation list, click **Manage Listings**.
3. Optionally, click **Email to Contacts** to see previously sent listings.
4. Depending on which tab you are on, use one of the following.

- From **All Listings**,
    a. Choose a listing to send.
    b. Click the **Email Listing** action link.
- From **Email to Contacts**,
    a. Click the **Email a Listing** button.
    b. Choose the listing you want to send from the list.
    c. Click **Continue**.

Choose contact(s)

1. Using drop-down lists, select options to filter for contacts.
2. Click **Update**.
3. From the result list, select the contacts to whom you want to send listings.
4. Click **Continue**.

   The system displays an **Add comments about the listing** text area. You can add your own comments about the listing.
   ⚠ Your comments *replace* the MLS comments. In the next steps, you can customize the email message and your contact information.

5. If necessary, type comments in the **Add comments about the listing** text area to *replace* the MLS comments.
6. Click **Continue**.

   The system displays a preview of the listing and email.

Edit and send message.

1. Review the message and click **Back** to make any changes.
2. Click **Send**.

Emailing Report

When you email a listing to contacts, the system creates a report that tracks each contact that received the message and if they viewed the listing, requested information, or requested a visit.

To View Report

1. Log into the Market Leader **Admin** interface.
2. In the navigation list, click **Manage Listings**.
3. Click **Email to Contacts**.
4. In the list, find the listing for which to view a report.
5. On the row for the chosen listing, click **View Report**.

   The system displays a pop-up **Email Listing Report**.

6. To return to the previous view, click **Close**.

⚠ The **View Report** option only appears after an **Email a Listing** email is sent.

Post on Craigslist

Post on Craigslist

A Craigslist post provides the following potential benefits.

- Help promote your listings.
- Drive visitors to your website.
- Add new contacts.

The **Post on Craigslist** procedure includes the following high level steps.

- Set up Market Leader and Craigslist forms.
- Copy and paste values from Market Leader form to Craigslist form.
- Complete Craigslist post.
- Mark listing as posted in Market Leader.

To post a listing

Set up Market Leader and Craigslist forms.

1. Log into the Market Leader **Admin** interface.
2. In the navigation list, click **Manage Listings**.
3. On the **Post on Craigslist** tab, for a given listing, click **New Post**.
4. After perusing the instructions, click **Open Craigslist to Post**.

   The system opens a new window to Craigslist. Craigslist either opens to a **choose the area nearest you** page or to the create new posting page.

   Do not close the Market Leader system window. You must switch between windows as you post.

5. To log in to your Craigslist account, click **log in to your account** and enter your credentials.

   If you do not have an account, click **Apply for Account**.

Copy and paste values from Market Leader form to Craigslist form.

1. Using both the Market Leader **Post on Craigslist** window and the Craigslist **create posting** window, copy the following values from Market Leader and paste them into Craigslist.
   - Price
   - Post Title
   - Description
   - Street
   - City
   - State

     You can use the same information for Specific Location and City. To improve search experience for users, enter the locations and price accurately.

2. In **Reply to** options, always select ***hide***.

   Choosing the ***hide*** option helps drive the user to your consumer website.

Complete Craigslist post.

1. To preview the ad, click **Continue**.
2. To accept Craigslist Terms, click **Continue**.

   Craiglist displays a Captcha form to finalize the post.

3. Follow the on-screen instructions and click **Continue**.
4. To publish, edit, or delete the ad, use the Craigslist confirmation email.
5. Close the Craigslist window.

Mark listing as posted in Market Leader.

1. In the Market Leader **Post on Craigslist** window, click **Mark as Posted in List**.

   The system sets the timer so you know when to post this listing again.

Suggestions

Keep an eye on your Craigslist account. When logged in to your Craigslist account, check your ads to see which have expired or been deleted. If you notice your listings being deleted (pink listings), contact Craigslist.

Cultivate the following habits.

- Post any listing you have not already posted.
- Post listings that you posted over 30 days ago. To view post aging, use the **Post on Craigslist** view **Days Posted** column.

Craigslist Guidelines

Craigslist Guidelines

Market Leader recommends that you adhere to the following guidelines. If you do not follow these guidelines, Craigslist might delete your posts and block you for spamming. Remember the goal of your post on Craigslist is not just to promote the listing, but also to get people to visit your website and sign up.

- Use the content provided.

Do not change the link code that is in the body of the post. Without this code, the post will not drive people to your website. The system auto-generates parts of the content, such as the title and parts of the body text, to help avoid repetitive, spam-like content that deters visitors. Experience has shown that the simple posts provided by the system are effective. They do not use complicated HTML, do not provide full home information, and do not add all pictures. Omitting some details encourages people to visit your website and sign up to get more information. You might make slight changes occasionally but make sure the content and wording are appropriate. Market Leader strongly recommends using the structure provided because it has been proven to work.

- Do not over-post listings.

  If you post the same listings repeatedly, or post too many listings in a row, Craigslist might delete your posts and block you for spamming. Craigslist automatically deletes posts after a certain number of days. When you fill out the form to post on Craigslist, you are notified, "Your ad will expire in X days." Plan to re-post your listings in X days to ensure you keep getting traffic from Craiglist, but do not post it more often than the expiry period. If Craigslist sees that you repeatedly post the same house, they might delete the listing and block you from making additional posts.

- Make sure you post in the right Craigslist area.

  The **Open Craigslist to Post** button takes you to the appropriate Craigslist page. If for some reason this button leads to an incorrect area or is not working, contact the Customer Support listed on your website. Only post in "Real Estate for Sale" in the proper geographic area.

- Fill out the form properly.

  Make sure you put the price in the "Price" field, the city in the "City" field, and so on. Craigslist uses the fields to match posts to searches. People can only find a post if the fields contain correct information.

- Do not show (i.e. always *hide*) your email address.

  If you neglect to select the ***hide*** radio button, Craigslist visitors can contact you directly instead of signing up as a contact on your website. Market Leader cannot track the success of Craigslist posts unless contacts visit your website from the post.

Single Property Websites

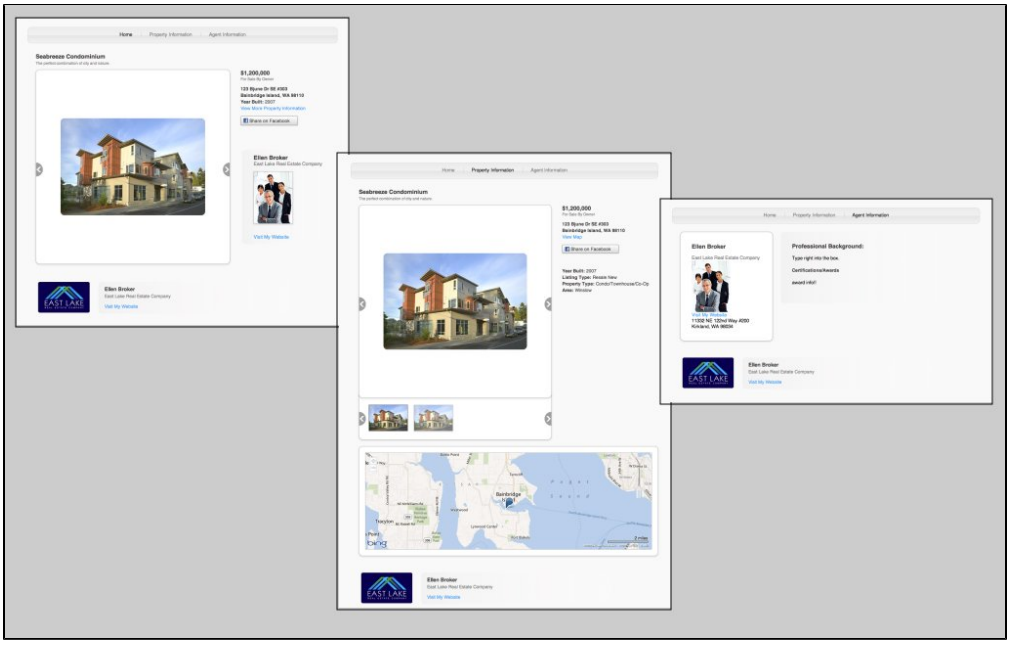
Single Property Websites

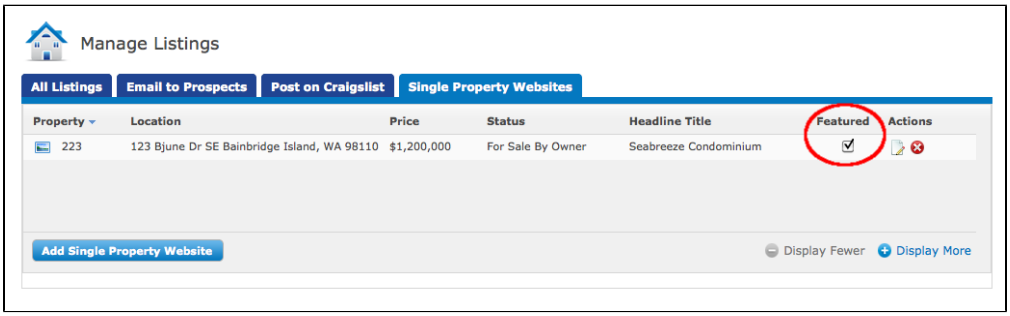
For a quick tutorial on how to use Single Property Websites, watch the following video.

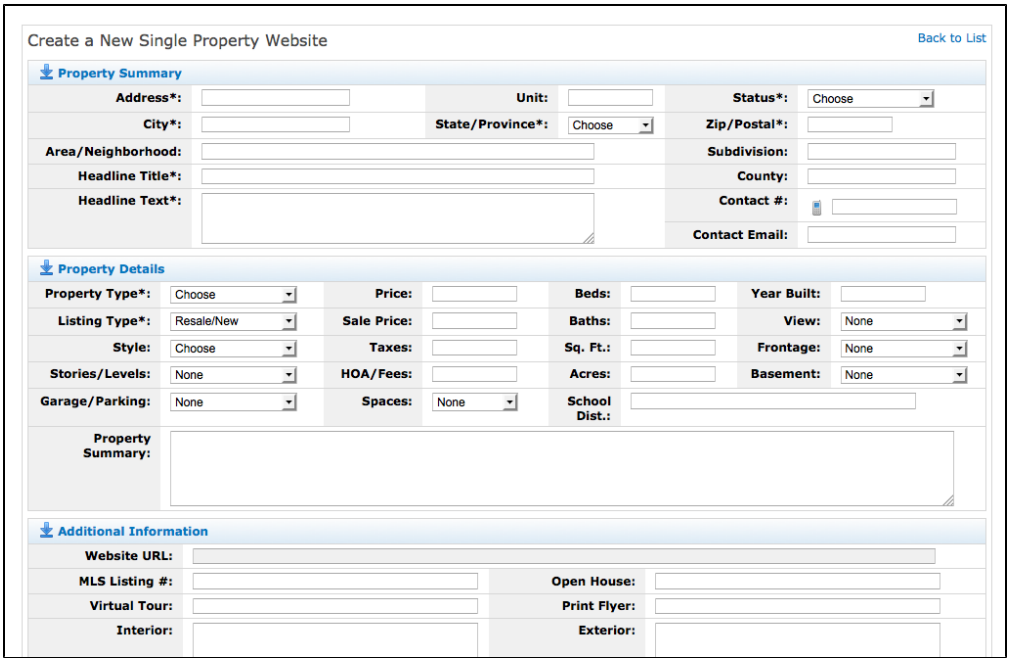
Single Property Websites

The single property websites feature enables you to create a page on your Market Leader domain that you can share through any channel by its unique URL. The page operates as a standalone website. That is, it includes navigation that changes the view content but keeps the contact on the same URL in their web browser, and it does not share any navigation with your consumer website. View content includes the following.

- Home
- Property Information
- Agent Information







Add Single Property Website

The Single Property Websites view enables you to view and manage configured websites. It includes a list of properties already added and a button to add a single property website. Each row in the list of websites includes a check box to mark a site as featured and Actions icons that

enable you to edit ( ) and delete ( ) a single property website. You can enter a maximum of 100 single property websites. When you reach the maximum number, Market Leader disables the Add Single Property Website button. When you add a website, you must supply values for the following fields.

- Address
- City
- State
- Zip/Postal Code
- Status

- Headline Title
- Headline Text
- Property Type
- Price
- Listing Type

To add a single property website, use the following procedure.

> You cannot use HTML markup in any Single Property Website form fields.

1. Log into the Market Leader Admin inteface.
2. In the navigation list, hover on **Manage Listings** and click **Single Property Websites**.
3. In the Single Property Websites view, click **Add Single Property Website**.

   Market Leader displays a Create a New Single Property Website form.

4. Provide values for all required fields.
5. Optionally, provide non-required fields.
6. Click **Save**.

   Market Leader saves the information, populates the **Website URL** field with a URL you can share to send contacts to the site, and adds a **Property Images**panel to the form.

7. Optionally, click **Add Image**.

   Market Leader opens a File Upload dialog which you can use to search your file system for images and select images, one at a time (up to 25). When you complete the File Upload dialog, your browser uploads the image in the background and refreshes the list of Property Images. The first image you upload is the primary image which is used on the Home page. You can use **Move this Photo Down** and **Move this Photo Up** controls in the Property Images list to re-order the images.

In the Single Property Websites list, a **Featured** check box enables you to activate and deactivate websites. When a website is deactivated, and anyone visits its URL, the browser redirects to your consumer website.

To edit a single property website, click an edit icon ( ) corresponding to the website you want to edit.

To delete a single property website, click a delete icon ( ) corresponding to the website you want to delete.

Search MLS

Search MLS

Market Leader integrates directly with your MLS to provide MLS data access and search within its system. The listings on your system can be viewed from either the Market Leader **Admin** interface or from the consumer website where contacts search for, view, and save listings. The content in the two views is essentially the same with a few exceptions. On the consumer website, the listing address might not display depending on MLS rules and the Listing Address setting you selected in the **Admin** interface.

> Until you submit the IDX agreement form that Market Leader sent you in email, and Market Leader has marked your account as IDX approved in its system, **MLS Search** does not display any listings.

To Search MLS

1. Log into the Market Leader **Admin** interface.
2. In the navigation list, click **Search MLS**.

   The system displays search options and an interactive map. To zoom, use the magnifying glass icons. To zoom and center, double-click a point on the map. To pan, use the d-pad icon or click and drag the map.

3. In the **Search Options** form, enter appropriate values.
4. Click **Search**.

   The search filters the listings displayed on the map and the list.
5. To view listing details, click an icon on the map or a row in the table of search results.

MLS Search displays search results sorted by ascending price.

You can Send Listings from **MLS Search**.

Save Search

To reuse search criteria, you can save a search.

1. To define a search, use the previous procedure.
2. On the map, click **Save Search**.

   The system displays the **Save This Search** form. If you have previous saved searches, you can update an existing search.
3. On the **Save This Search**form, try one of the following.
   - To update a previously saved search,
     a. Click **Update search**.
     b. Select a search name from the drop-down list.
   - To save new search criteria,
     a. Click **Save new search**.
     b. Type a name for the search in the text box.
4. Click **Save**.

Using Saved Searches

To reuse search criteria, use the following procedure.

1. Log into the Market Leader **Admin** interface.
2. In the navigation list, click **Search MLS**.
3. In **Search Options**, use the **Saved Searches** drop-down list to select a saved search.
4. Click **Search**.

See Also

- Email a Listing
- Send Listings
- Manage Listings

Listing Details

Listing Details

The **Listing Details** view provides the following controls.

- **Previous** and **Next**.

  Traverse the search results at the detail level using these controls.

- **Print**

  Create a flyer.

- **School Report**

Read local online reviews of the area schools.

- **Contacts That have Viewed This Listing**

  Gauge contact interest in the property.

View Listing Details

You can access listing details from the Manage Listings view or the Search MLS view. To view listing details, try one of the following.

- On the **All Listings** table of **Manage Listings**, click a **MLS#**.
- In a **MLS Search**,
  1. Click a map icon or a row in the search results table.
  2. In **Viewed Listings**, click **View Details** for the current listing.

Marketing

Marketing

This page links you to descriptions of market leader functionality to create and maintain marketing collateral and to automatically generate interest-building communications with contacts. Depending on the market leader product type you licensed, you might have one or more of the following features available in the admin interface. For detailed information on these features, refer to the following sections.

- Marketing Materials
- Campaigns
- File Manager

⚠	Before using Marketing functionality for the first time, verify that your computer meets the requirements.

Marketing Materials

Marketing Materials

This page provides a high-level overview of **Marketing Materials** functionality built into Leader. Marketing Materials functions enable you to find existing materials, create or edit materials, and deploy materials. In a typical workflow, you take the following steps.

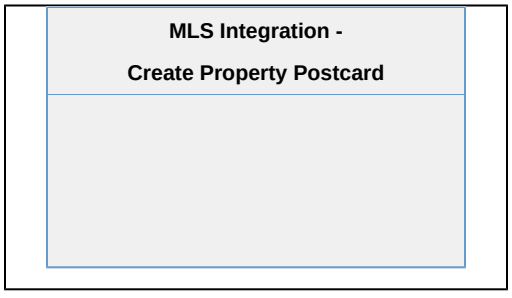
1. Select a piece.
2. Optionally, create or edit a piece.
3. Choose an action for a piece.

This manual describes Marketing Materials in the following sections.

- Marketing Materials Selections
- Marketing Materials Editor
- Marketing Materials Actions
- Marketing in Motion

Create a Property Postcard

As one example of what you can do with **Marketing Materials**, the following video demonstrates how to create a property postcard from an MLS integration.



Marketing Materials Selections

Marketing Materials Selections

This section describes how you can find and select marketing materials with which to work. The system provides you with thousands of professionally designed marketing pieces that you can email and/or print and distribute by direct mail to clients. You can send pre-built pieces or you can customize templates to create Business Cards, Guides, Newsletters, Flyers, Greeting Cards, Postcards and Sports Schedules.

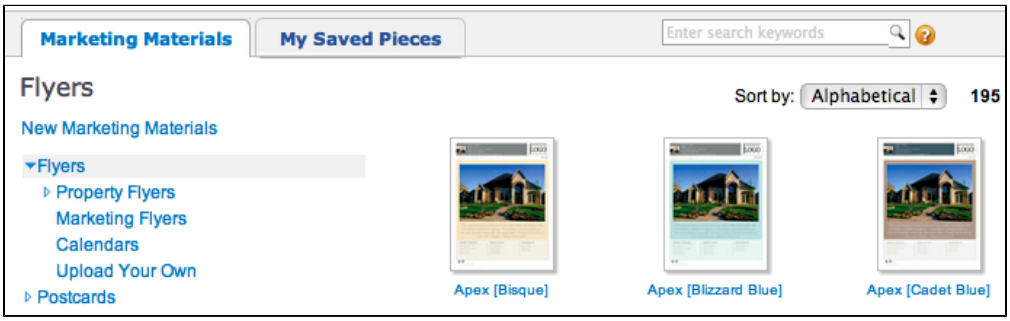
For more detailed information on finding and selecting marketing materials, refer to the following sections.

- Select a Marketing Piece
- Search for Marketing Materials
- Sort Marketing Materials and Saved Pieces
- Find Saved Pieces
- Find Available Sizes

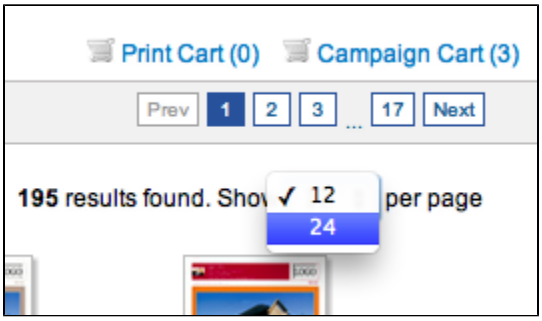
Select a Marketing Piece

Select a Marketing Piece

To select a marketing piece, click on **Marketing Materials.** Here, you are able to select what type of marketing material you'd like to use. You can find all pieces in the **Marketing Materials Library** in one or more sections of the **Marketing Materials** tree**.** Here, you can sort through the entire catalog of pieces available to you. Click on any link in the tree to starting seeing marketing materials. Clicking on sub-sections of that link will further refine the pieces you see.



You have the ability to **Search** for marketing materials based on keywords or **Sort** the **Marketing Materials Tree** at any time. Most sections in the **Marketing Materials Tree** have more pieces available then can be displayed on a single page. To see all of the pieces available, click on the Page buttons: **Previous,Next** or **Numbered Pages.** You can also choose to see more or fewer marketing pieces displayed per page by selecting a quantity from the **Show per Page** Drop down menu.

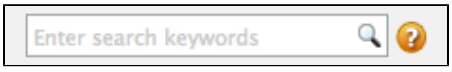


NOTE: Selecting more pieces displayed per page can sometimes slow down the loading time for new pages in the **Marketing Materials Tree.**

Search for Marketing Materials

Search for Marketing Materials

Find the marketing material template you're looking for quickly and easily by using the **Search Option** in the Marketing Materials selector. Instead of looking through the complete library by navigating the Marketing Materials Tree, just use**Search.** Enter any word or phrase into the **Search Bar** and either hit enter or click on the magnifying glass icon.



Here are some quick search tips:

1. **Default search**

By default, search will match on ANY of the words entered. Therefore a search for **property marketing flyers** will match on "property" or "marketing" or "flyers." To match on an exact phrase, use double quotes around your phrase.

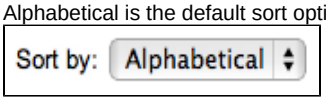
2. **Exact phrase**
   Words enclosed with double quotes ("") will search for those words in that exact order. So **"property marketing flyers"**will only return results if an exact match for that entire phrase is found.
3. **Multiple phrases**
   You may join groups of search words with AND, which will match for each of the phrases entered. So **"Spanish flyer" AND "holiday theme"** will only return results if both of those phrases are found.

Sort Marketing Materials and Saved Pieces

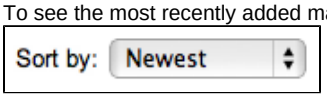
Sort Marketing Materials and Saved Pieces

You can find Marketing materials by sorting the contents of the Marketing Material Tree. You have the option of sorting pieces based on the following criteria**.**

- **Alphabetical**
  Alphabetical is the default sort option. Marketing materials will display in order of their title from A to Z.



- **Newest**
  To see the most recently added marketing material in any given section of the **Marketing Materials** tree, use the **Newest** sort option.

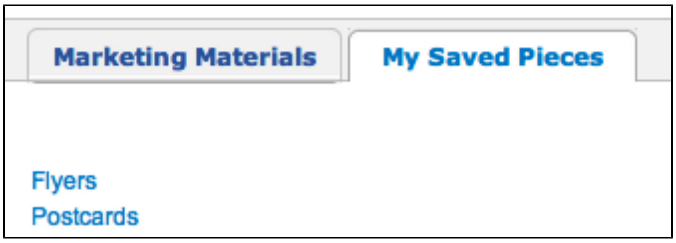


- **Most Used**
  To see the most often used marketing materials in the past two months, use the **Most Used** sort option.

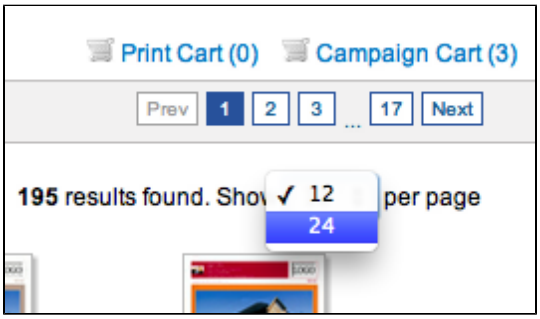
Find Saved Pieces

Find Saved Pieces

You can find all saved marketing pieces in your account under the **My Saved Pieces** tab of the **Marketing Materials** view**.** In My Saved Pieces, you can sort through all the pieces you created and saved in your account. Click on any link in the **My Saved Pieces** to display thumbnail images of your saved pieces. If you have not saved any pieces in a category, no thumbnail images display for that category. If you want to work in a category for which you have no saved pieces, switch to **Marketing Materials.**



If you have a large number of saved pieces in your account, your saved pieces may appear on multiple pages. To see all of the pieces available, click on the Page buttons: **Previous,Next** or **Numbered Pages.** You can also choose to see more or fewer marketing pieces displayed per page by selecting a quantity from the **Show Per Page** Drop down menu.



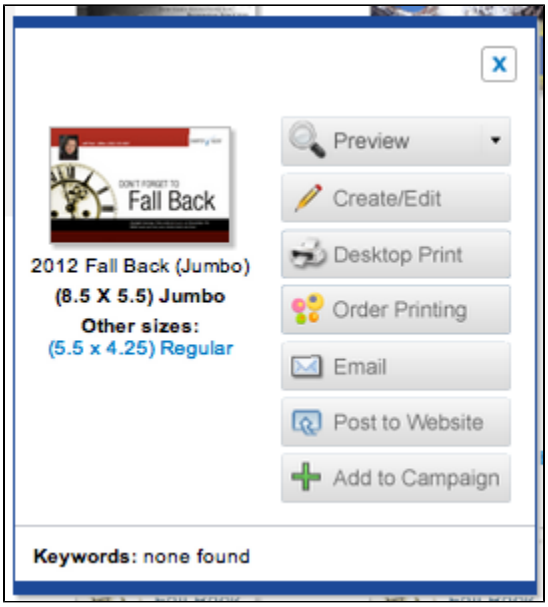
All marketing materials saved in your account can alternatively be reviewed in your **File Manager.** To access saved marketing piecesclick on the File Manager button on the left hand side of your account below **My Profile.** Then click on the **My Marketing Materials** button.

Find Available Sizes

Find Available Sizes

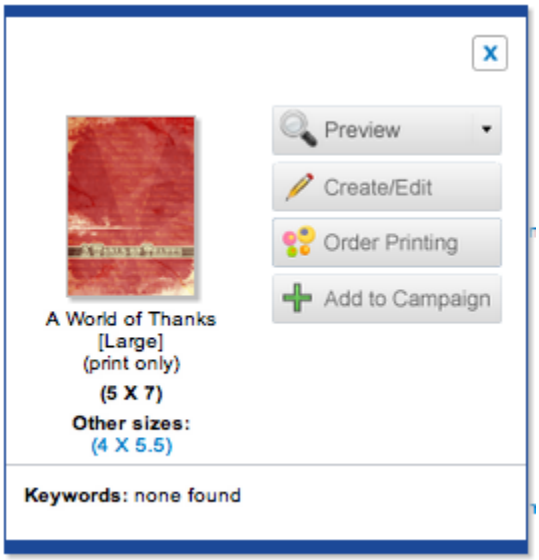
Postcards

Many **Marketing Materials** postcards come in two sizes: Jumbo 8.5 x 5.5" and Regular 5.5 x 4.25". If a postcard is available in both sizes, you can access a Regular or Jumbo Size template by clicking on a size link just under **Other Sizes** in the Marketing Materials template action window **.** Postcards that are not available in multiple sizes do not show additional sizes.



Folded Greeting Cards

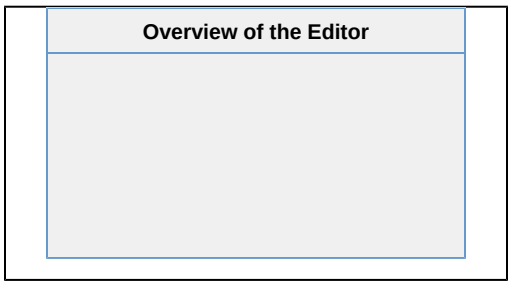
Many **Marketing Materials** folded greeting cards come in two sizes: Large 5 x 7" and Small 4 x 5.5". If a folded greeting card is available in both sizes, you can access a Large or Small sized template by clicking on a size link just under **Other Sizes** in the Marketing Materials template action window**.** Folded Greeting cards that are not available in multiple sizes do not show additional sizes.



Marketing Materials Editor

Marketing Materials Editor

Since there are so many pieces provided in Marketing Materials, this help only covers a small sample in-depth. Once you learn how to use the editing tools and features, you can customize any piece in the system. This section focuses on the editor tool used to customize all marketing pieces with the exception of Marketing in Motion pieces which use the Marketing In Motion Editor.



To create and edit a piece, you must have **Microsoft Silverlight** 4 or later installed on your computer. If you do not have it installed, the system prompts you to install it the first time you edit a template. For details on how to install **Microsoft Silverlight,** see Install Microsoft Silverlight.

For detailed information on using Marketing Materials Editor, refer to the following sections.

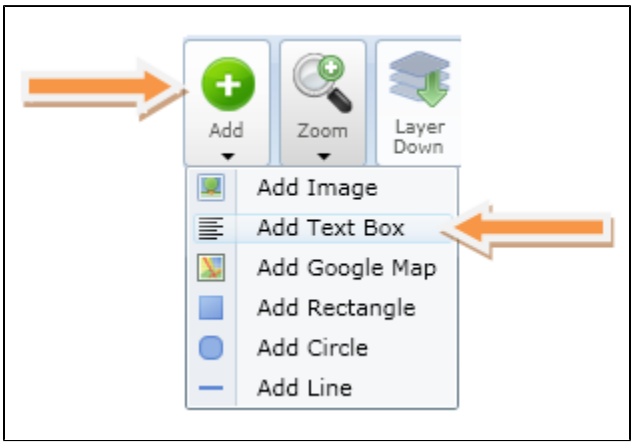
- Editing Text
- Editing Images
- Text management tools
- Map Editing
- Shape Editing
- Changing Views
- Preview a Marketing Piece
- Page Controls

Editing Text

Editing Text

Add a Text Box

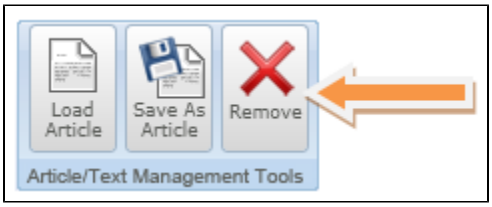
To **add a Text Box** to your marketing piece click on the **Add** button in the Main Tools section of the editing tool bar and select **Add Text Box.**



You can modify this Text Box by dragging and dropping it to the desired location on your marketing piece. Use the Text Box's corner points to change the shape and size of your Text Box.

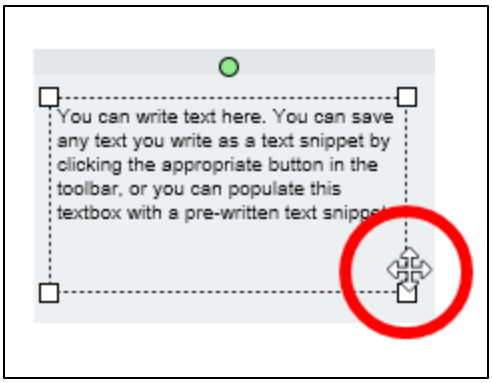
Delete a Text Box

To delete a Text Box, select the Text Box you wish to remove. Click on the **Remove** button in the Article / Text Management Tools section of the editing toolbar.



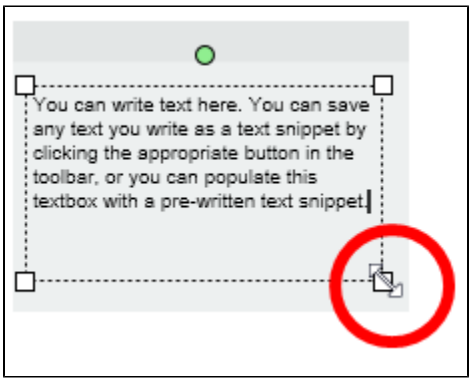
Move a Text Box

To Move a Text Box, click on the Text Box and position your cursor over it until the cursor changes from a pointer to a 4-directional arrow. Click the Text Box, drag and drop it to the new location on the marketing piece.



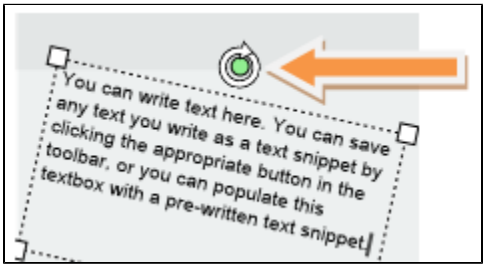
Resize a Text Box

To Resize a Text Box, click on the Text Box and grab one of the four corners. You can change the height, width, or overall size of the Text Box by dragging and dropping any one of the four corner points.



Rotate a Text Box

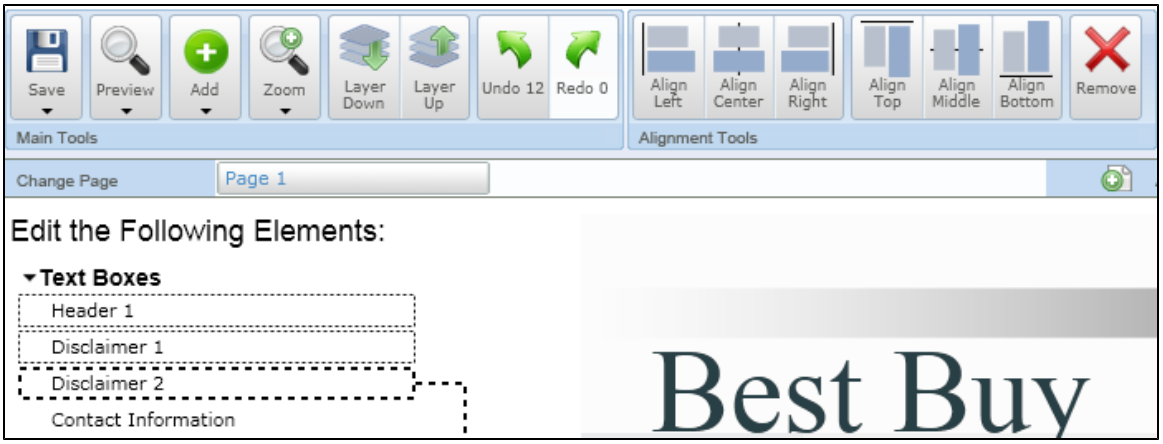
To **Rotate** a Text Box, click on the Text Box and move your cursor over the green circle located on the top of your Text Box. Your cursor will change shapes from an arrow to a round arrow. You can then click and drag the circle to rotate your Text Box around a central pivot point.



Align Text Boxes

Aligning Text Boxes is a great way to make your edited marketing piece look more professional and polished.

1. To align, first select one or more Text Boxes that you would like to align by holding down the **Shift Key** with each additional selection.
2. After all aligning boxes are selected the Alignment Tools section of the editing toolbar appears.



3. To select the alignment option that works for you, imagine a rectangular box drawn around the outer perimeter of all the text boxes you selected.

- **Align Left** aligns all text boxes to the left most position of the imaginary perimeter box.

- **Align Right** aligns all text boxes to the right most position of the imaginary perimeter box.

- **Align Center** aligns all text boxes to the center position along the page's horizontal of the imaginary perimeter box.

- **Align Top** will align all text boxes to the top most position of the imaginary perimeter box.

- **Align Middle** will align all text boxes to the middle vertical position of the imaginary perimeter box.

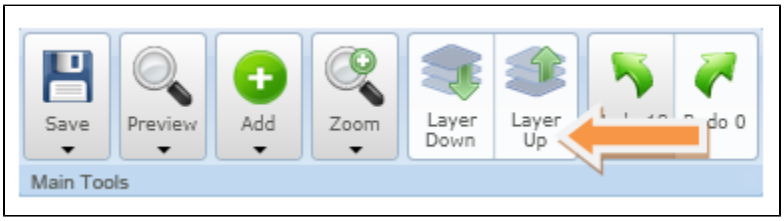
- **Align Bottom** will align all text boxes to the bottom most position of the imaginary perimeter box.

You can also align text boxes in the same way with other marketing materials elements like Images, Google Maps, and Shapes.

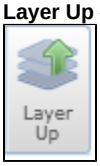
To undo a Text Box alignment, select **Undo.**

Layer Text Box

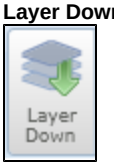
To move a Text Box above or below any other editable Element in your marketing piece, select the Text Box. In the Main Tools section of the editing tool bar you'll be able to select from the **Layer Down** and **Layer Up** options.



Layer Up – This button will bring the selected Text Box one layer forward from its current position.



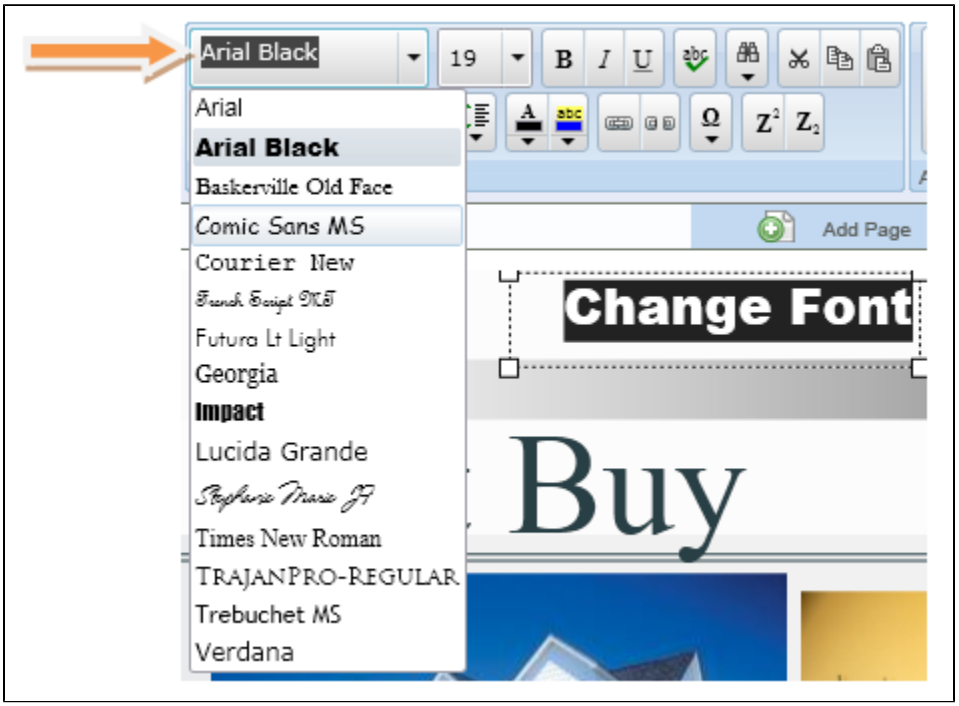
Layer Down – This button will send the selected Text Box one layer down from its current position.



> ⚠ Please be aware that certain background and other locked elements in marketing materials cannot be edited or modified. Layering tools only apply to editable elements.

Change Font Type

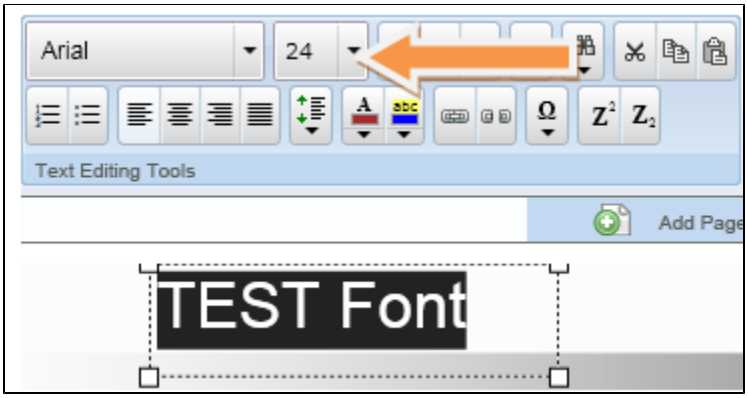
To change or modify a **Font Type** on your marketing piece highlight the text you wish to change. A list of available fonts for the template you are working with will appear in the Text Editing Tools section of the editing toolbar.



> ⚠ Please be aware that specialty fonts are not available on all marketing pieces.

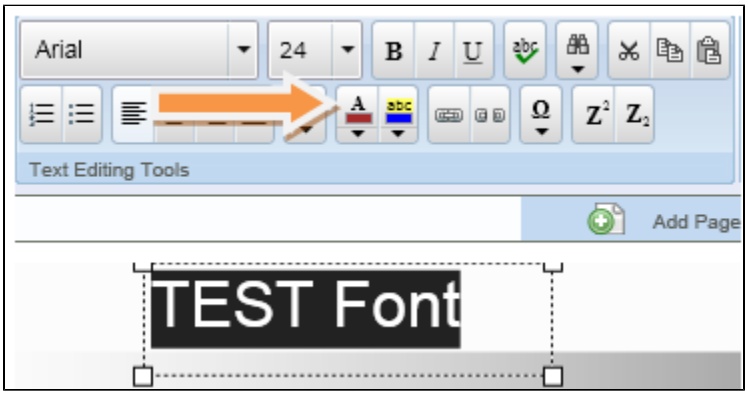
Change Font Size

To change or modify a **Font Size** on your marketing piece highlight the text you wish to change. The current font size will be displayed in the Text Editing Tools section of the editing toolbar. Select your desired font size from the drop down list.



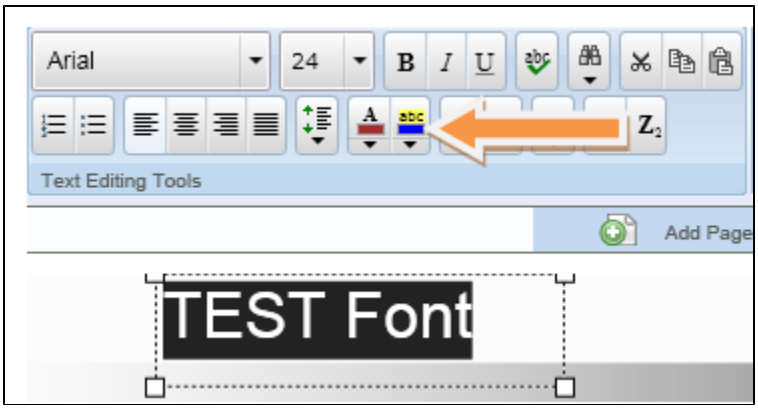
Change Text Color

Highlight the editable text you wish to modify. Select the new **Text Color** from the Text Editing Tools section of the editing tool bar.



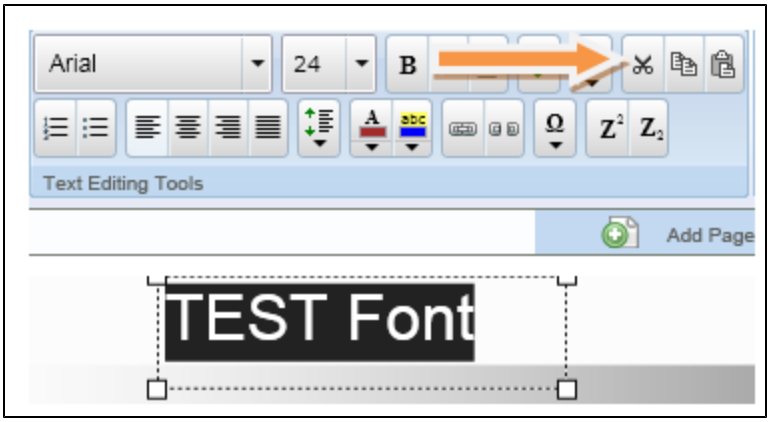
Highlight Text

You can **Highlight Text** by selecting the editable text you wish to modify. Select the color you wish to use as your highlight color from the Text Editing Tools section of the editing tool bar.



Cut Text

To cut text from a Text Box first, highlight the text you wish to Cut. Then click the **Cut** button in the Text Editing Tools section of the editing Toolbar. The highlighted text will be removed from the Text Box. You can then Paste this text elsewhere on the marketing piece.



You can also use the keyboard shortcut Ctrl+X to **Cut** text.

Copy Text

To copy text from a Text Box first, highlight the text you want to **Copy.** Then click the **Copy** button in the Text Editing Tools section of the editing Toolbar. You can then Paste this text elsewhere on the marketing piece.

You can also use the keyboard shortcut Ctrl+C to **Copy** text.

Paste Text

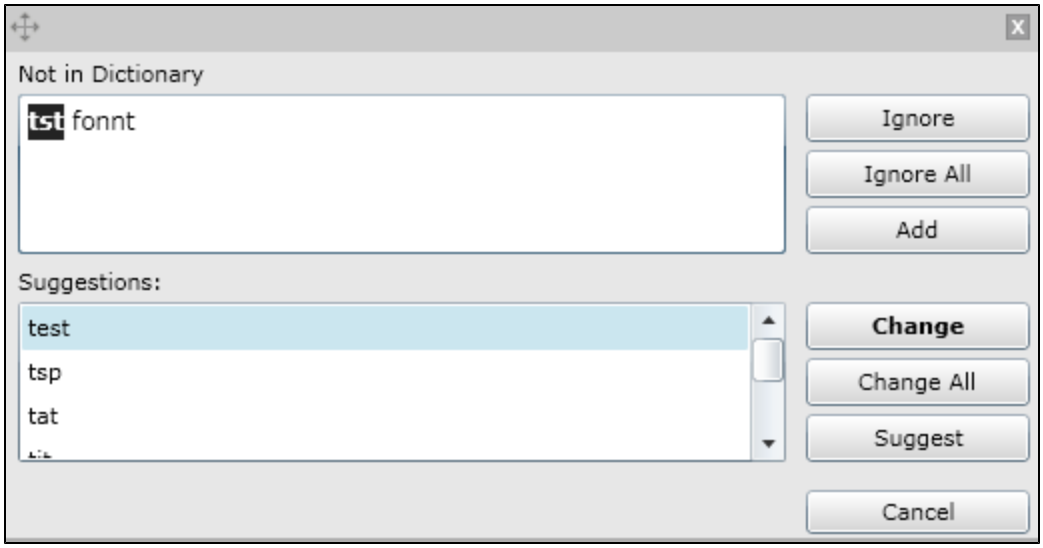
To paste text into a Text Box first, highlight a section of text and **Cut** or **Copy** the text. You can copy or cut sections of text in your marketing piece or from other applications. Next, move your cursor to the position where you want to **Paste** the text in a **Text Box** and click on the **Paste** button in the Text Editing Tools section of the editing toolbar.

You can also use the keyboard shortcut Ctrl+V to **Paste** text.

Spell Check

To **Spell Check** the text in your marketing piece, first highlight the text you'd like to check. Next, click the **Spell Check**button in the Text Editing Tools section of the editing toolbar.

If any spelling errors are found, you will be alerted in a pop-up window.

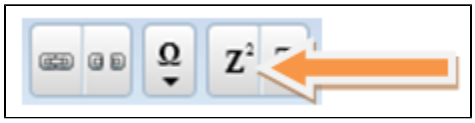


In the pop-up window, you have the following options.

- Select **Ignore** or **Ignore All** to dismiss the suggested changes that the Spell Check Dictionary has made for you.
- Select the **Add** button if you wish to add the word to your Spell Check Dictionary.
- Select **Change** or **Change All** to accept the highlighted suggested word in your marketing piece.
- If none of the suggested spelling changes are correct, you can type the correct word into the Spell Check display box or click **Suggest** for more options.

Add Superscript

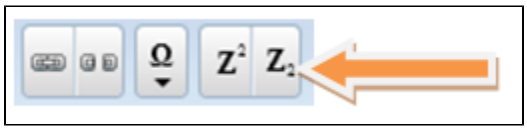
To change text to **Superscript,** highlight your text and select the **Superscript** button in the Text Editing Tools section of the editing toolbar.



To remove superscript, highlight the text and click the button again.

Add Subscript

To change text to **Subscript,** highlight your text and select the **Subscript** button in the Text Editing Tools section of the editing toolbar.



To remove subscript, highlight the text and click the button again.

Adding Symbols to Your Text

To add a special character or symbol to your marketing piece, start by selecting the **Text Box** where you will add your symbol. Position your cursor where you want to insert the symbol. In the Text Editing Tools section of the editing tool bar, click on the **Symbol** button. Here you will find a list of commonly used symbols, glyphs and characters.

Add Hyperlink

To add an active hyperlink to your marketing piece for email or online marketing, highlight the entire text you wish to turn into a hyperlink and click on the **Insert Hyperlink** button in the **Text Editing Tools** section of the editing toolbar.

You may also edit the URL of any existing hyperlink using the **Insert Hyperlink** button. It is not necessary to include *http://* or *https://*.

Remove Hyperlink

To remove an **active hyperlink** on your marketing piece highlight the linked text and click on the **Remove Hyperlink** button in the Text Editing Tools section of the editing toolbar.

Paragraph Alignment

To change the paragraph alignment of editable text in a marketing piece, select the **Text Box** and highlight the text that you wish to modify. If no text is highlighted, the paragraph alignment applies to the section of text in which the text cursor appears.

Select one of the **Alignment Buttons** in the **Text Editing Tools** section of the editing toolbar.

- **Align Text Left**
  Aligns text to the left of the **Text Box.**

- **Align Text Right**
  Aligns text to the right of the Text Box.

- **Align Text Center**
  Aligns text to the center of the **Text Box.**

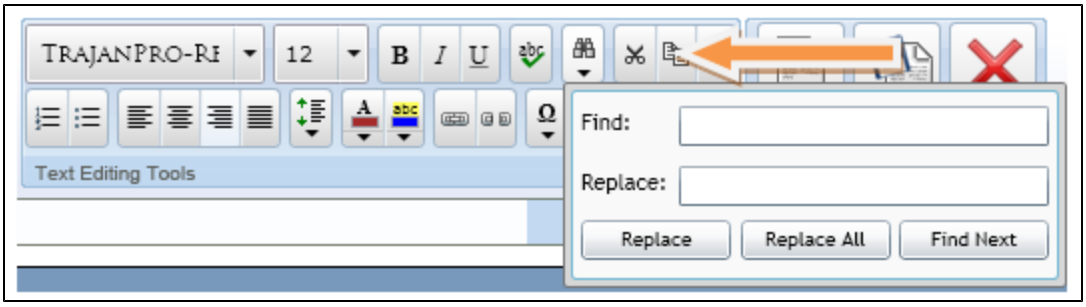
- **Align Text Justified**
  Aligns text to both the left and right margins, adding extra spaces between words where necessary.

Paragraph Spacing

To change the spacing between paragraphs of text in a **Text Box,** highlight the lines of text you wish to change. Then select the **Paragraph Spacing** button in the **Text Editing Tools** section of the editing toolbar. You can increase or decrease the space by standard amounts (Single Spacing, 1.5 Spacing, or Double Spacing).

Find and Replace Text

To **Find and Replace Text** first, click on the **Text Box** where you want to find your text or phrase. You may also highlight a section of text if you're only looking for the word or phrase in a limited area. Then select the **Find/Replace** button in the Text Editing Tools section of the editing toolbar.



Here you can enter a word or phrase for which you are looking.

Click **Find Next** to find and highlight the text or phrase in a text box.

Click **Replace** to find and replace the text or phrase you were searching for with new text you specified.

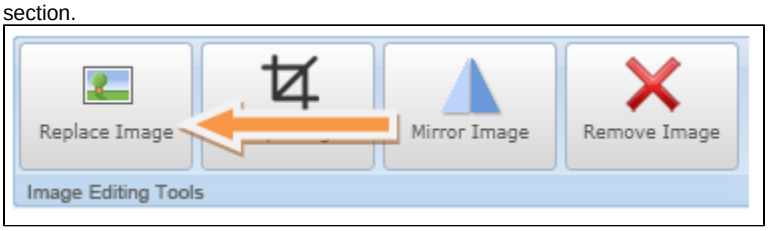
Click **Replace All** to find and replace all instances of the text or phrase for which you are looking in a text box that was selected.

Editing Images

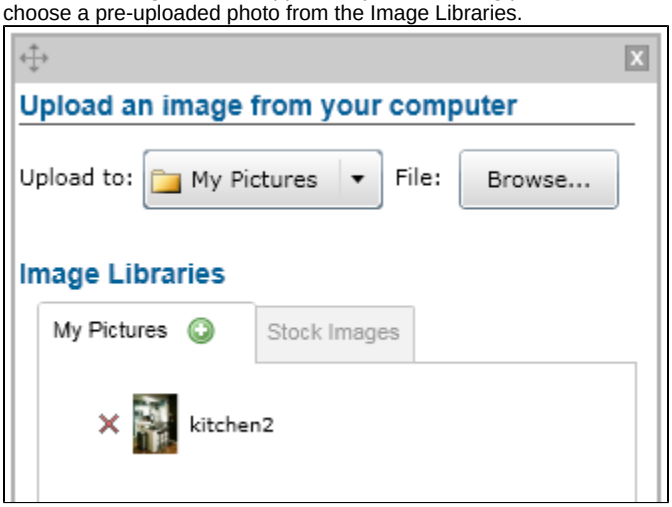
Editing Images

Replace an Image

To change a placeholder photo click on the image you want to replace, and then click on the **Replace Image** button in the Image Editing Tools section.



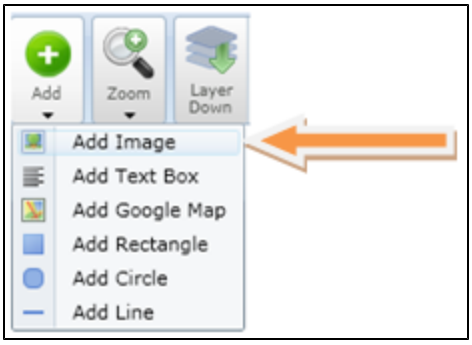
A standard **Image Box** will appear on your marketing piece. You can choose to Upload a New Photo (By Clicking on the Browse Button) or choose a pre-uploaded photo from the Image Libraries.



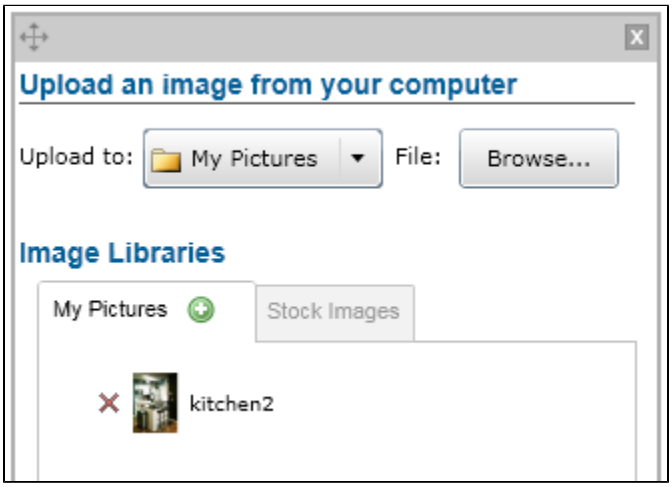
Your new Image Box can be edited further Resized, Moved, Rotated, etc. before or after replacing the placeholder image.

Add an Image

To add an Image, Click on **Add** in the Main Tools section of the editing toolbar and select **Add Image.**



A standard **Image Box** appears on your marketing piece. You can choose to Upload a New Photo (By Clicking on the Browse Button) or choose a pre-uploaded photo from the Image Libraries.



You can further edit a new **Image Box** by **Resizing, Moving, Rotating,** etc. before or after replacing the placeholder image.

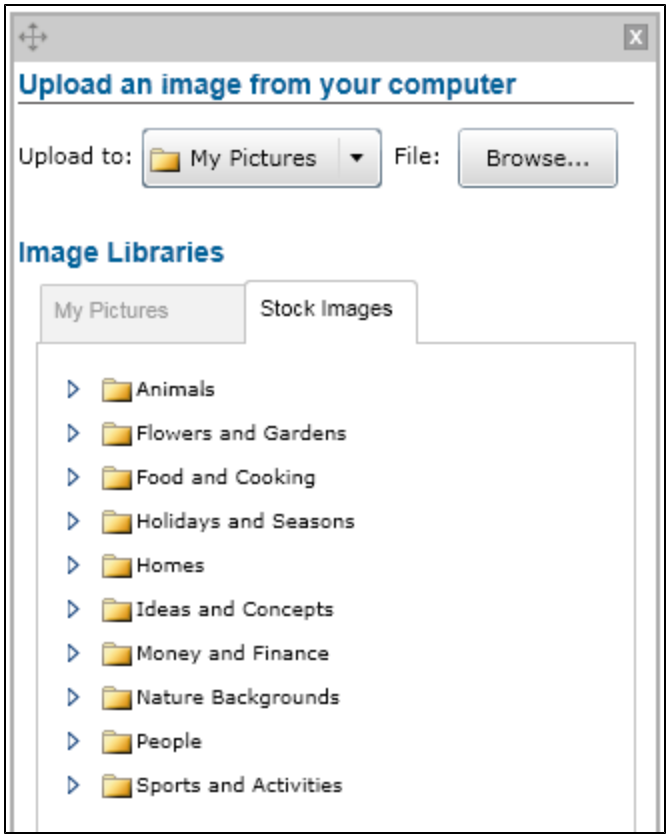
Add a Stock Image

To add **Stock Images** from Marketing Materials image library use the following steps.

1. Select an existing **Image Box.**
2. Click **Replace Image** or **Add an Image** to your marketing piece by clicking **Add** and selecting **Add Image.**

A standard **Image Box** appears on your marketing piece.

To select from a **Stock Image** click on the Stock Images tab to see the available Stock Images.



Marketing Materials stores all available **Stock Images** in the **Image Library** folder of File Manager. You can only access these images while editing a marketing piece.

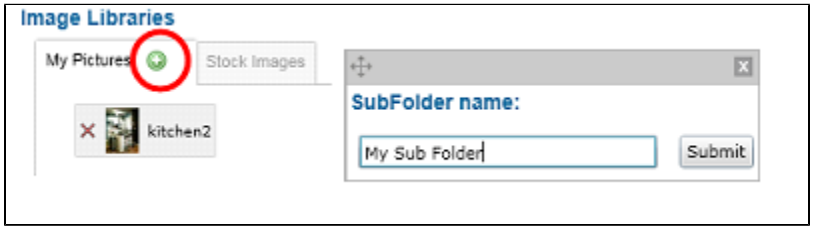
To update an Image Box with a Stock Image, select an Image from the list of available files. Newsletter header images are considered **Stock Images** and are saved in the **Header** folder.

Delete Image

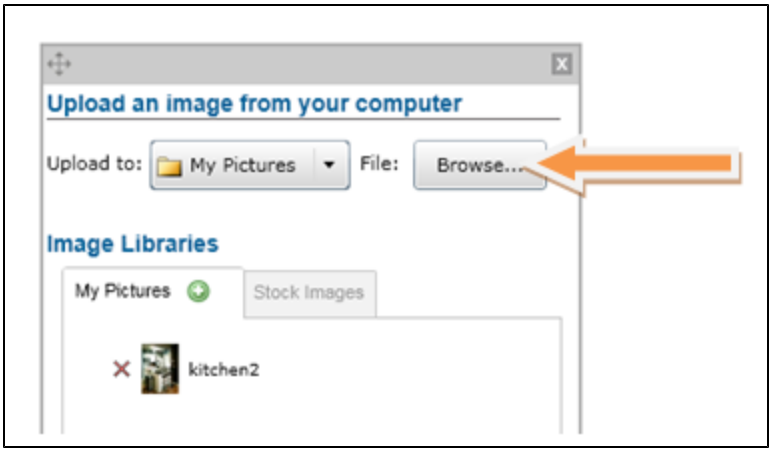
To delete an image, first select the image you wish to remove. Next, click on the **Remove Image** button in the **Image Editing Tools** section of the editing toolbar.

Upload Image(s)

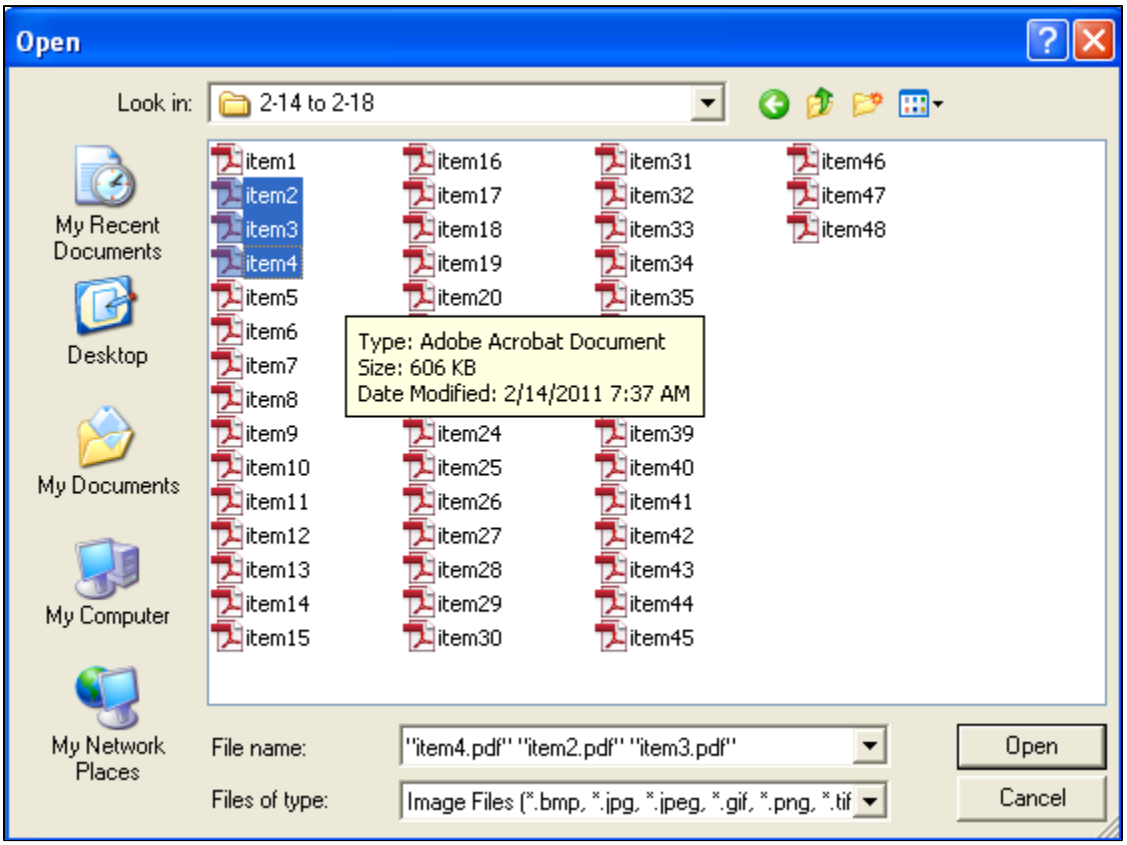
To **Upload an Image**, either select an existing editable **Image** or select the Add Image button in **Main Tools** section of the editing toolbar. When the **Image Box** is selected the **Image Editing Tools** section of the editing toolbar appears. Click on the **Replace Image** button. You must select a file to save images in your account. You can create **Sub Folders** in **File Manager** by clicking on the green **Add** button in the **File Manager** section of the **Replace Image** editing window.



Next, select the **Browse** button in the **Upload an image from your computer** section of the **Replace Image** editing window.



⚠ Multiple photos can be uploaded at the same time. Use your **Shift** or **Control** keys to select multiple photos.



After selecting the appropriate photo or photos, click the **Open** button. Depending on your photo or photos file size, it may take a few minutes to fully import new pictures into your account. Please be patient and allow extra time for larger files.

Move an Image

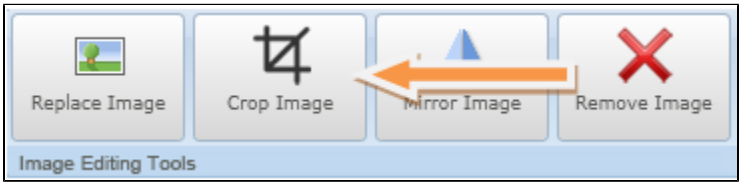
To **Move an Image,** click on the **Image Box** and position your cursor over it until the cursor changes from a pointer to a 4-directional arrow. Click the **Image Box,** drag and drop it to the new location on the marketing piece.

Resize an Image

To **Resize an Image,** click on the **Image Box** and grab one of the four corner points. You can change the height, width, or overall size of the **Image Box** by dragging and dropping any one of the four corner points.

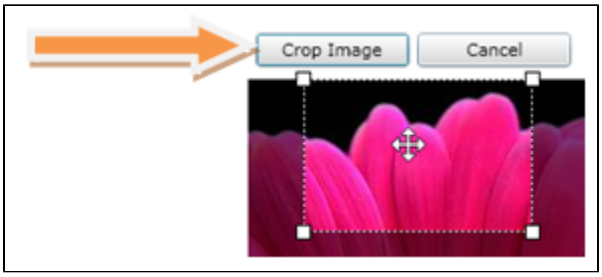
Crop an Image

To **Crop an Image,** select the **Image Box** you wish to crop and select the **Crop** button in the **Image Editing Tools** section of the editor toolbar.



Drag the **Crop Box** around with your mouse or use the arrow keys on your keyboard to nudge it. (Holding shift while using the arrow keys will nudge the crop area by 10 pixels.) You can resize the crop area by grabbing a corner and dragging it.

The **Crop Box** will always maintain the proper aspect ratio (height and width ratio) of your **Image Box.**
Once you are happy with your image, click the **Crop Image** button.

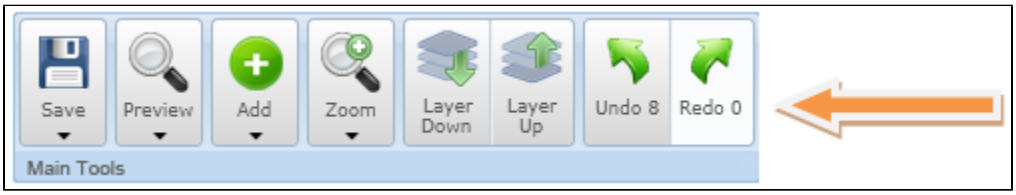


Rotate an Image

To **Rotate an Image Box,** select the Image Box you wish to rotate and move your cursor over the green circle located on the top of your **Image Box.** Your cursor will change shapes from an arrow to a round arrow. You can then click and drag the circle to rotate your **Image Box** around a central pivot point.

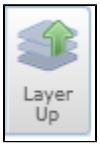
Layer Images/Text

To move an **Image Box/Text Box** above or below any other editable element in your marketing piece, select the Image Box.



In the **Main Tools** section of the editing tool bar you'll be able to select from the **Layer Down** and **Layer Up** options.

Layer Up – This button will bring the selected Image Box/Text Box one layer forward from its current position.



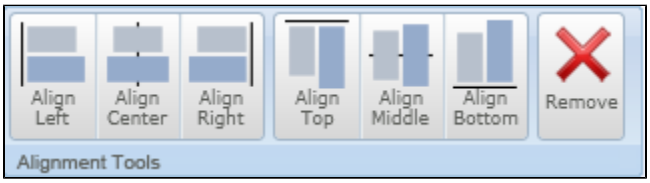
Layer Down – This button will send the selected Image Box/Text Box one layer down from its current position.

> ⚠ Please be aware that certain background and other locked **Elements** in marketing materials cannot be edited or modified. Layering tools only apply to editable **Elements.**

Align Images

To **Align Images,** first select two or more Image Boxes that you would like to align by holding down the **Shift Key** or**Control Key** with each additional selection.

After all boxes to be aligned are selected the **Alignment Tools** section of the editing toolbar will appear.



To select the alignment option that will work for your needs you'll need to imagine a rectangular box drawn around the outer perimeter of all the image boxes you've selected.

1. **Align Left** will align all image boxes to the left most position of the imaginary perimeter box.

2. **Align Right** will align all image boxes to the right most position of the imaginary perimeter box.

3. **Align Center** will align all image boxes to the center position of the imaginary perimeter box.

4. **Align Top** will align all image boxes to the top most position of the imaginary perimeter box.

5. **Align Middle** will align all image boxes to the middle vertical position of the imaginary perimeter box.

6. **Align Bottom** will align all image boxes to the bottom most position of the imaginary perimeter box.

Image Boxes can also be aligned in the same way with other **marketing materials** elements like **Text Boxes,Google Maps,** and **Shapes.**
To undo an Image box alignment, select the **Undo** Button on the **Main Tools** Bar.

Mirror Image

Selecting the **Mirror Image** button changes a photo so that it appears as the reflection of the original image.

To **Mirror** a photo, select an Image Box. The **Mirror Image** button will appear in the **Image Editing Tools** section of the editing toolbar.

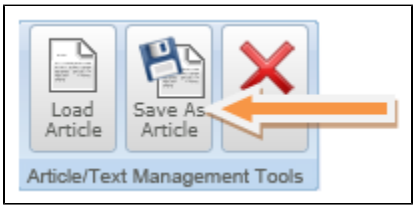
To reverse the mirror, hit the **Mirror Image** button again or click **Undo** in the **Main Tools** section of the editing toolbar.

Text management tools

Text management tools

Saving Prewritten Text

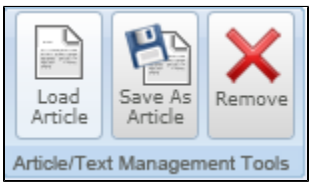
To save any text created in the editor for use on other pieces in your account, select the text box you wish to save and click on the **Save As Article** button in the Articles / Text Management Tools section of the editing toolbar.



You'll be asked to give your text a file name for future reference. After you've entered a name, click **Save.** Your text can now be inserted on any other marketing piece you create in the editor.

Add Saved Text

To add a pre-written article or saved text section to your marketing piece, simply click on the **Text Box** where you want to add the saved paragraph or article or **Add a Text Box** 1 to your marketing piece. Then click on the **Load Article** button in the **Articles / Text Management Tools** section of the editing tool bar.



Find your saved text from the My Articles folder in the list of available articles and click on it. Show an image with the My Articles folder

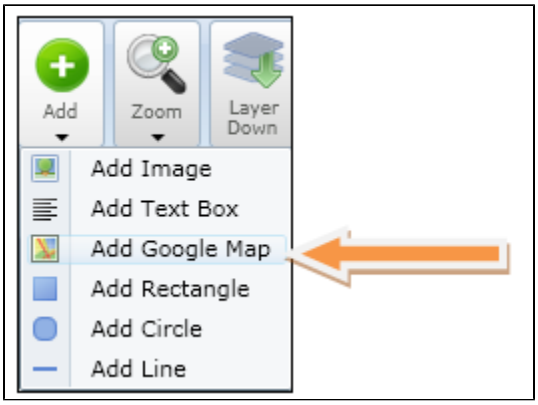
You can change the article text and resave the modified paragraph(s) into your library for future use by selecting the Save as Article button.

Map Editing

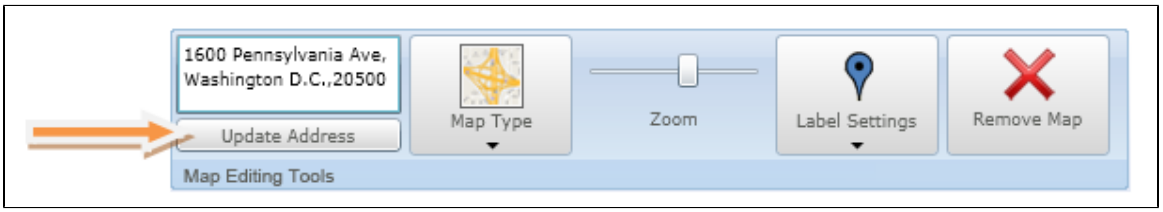
Map Editing

Add a Google Map

To **Add a Google Map** to your marketing piece first, click on the **Add** button in the **Main Tools** section of the editing toolbar. Then select the **Add Google Map** button. A new **Google Map** will be inserted just like an **Image Box** into your marketing piece.



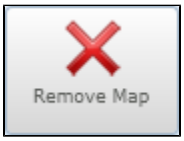
To **customize your new Google Map,** update the address in the **Address Box** in the **Map Editing Tools** section of the editing toolbar that will appear when a **Google Map** is selected and then click **Update Address.**



Your new **Google Map** can be edited further (**Resized,Moved,Rotated,** etc.) before or after **Updating the Address.**

Delete Google Map

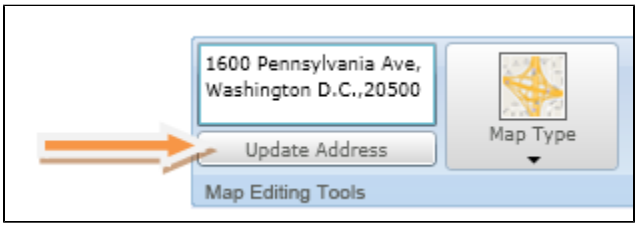
To delete a Google Map, select the **Google Map** you wish to remove. Click on the **Remove Map** button in the **Map Editing Tools** section of the editing toolbar.



Update Google Map Address

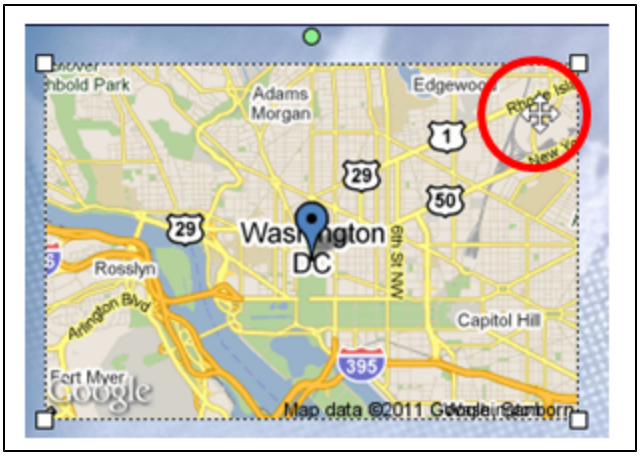
To update the **Google Map** with your desired location, update the address in the **Address Box** in the **Map Editing Tools**section of the editing toolbar that will appear when a **Google Map** is selected.

Enter in an exact address to center the map on a single location. You may also enter in landmarks or other geographical markers to create your map, and then click **Update Address.**



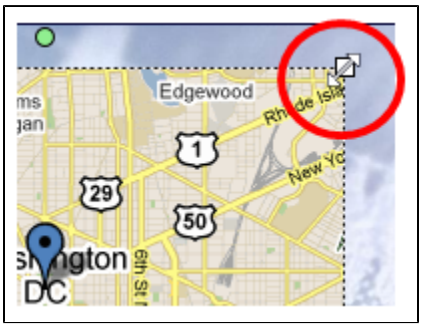
Move a Google Map

To **Move,** select your **Google Map** and place your cursor over the map until the cursor changes from a pointer to a 4-directional arrow. Click the map, drag and drop it to the new location on the marketing piece.



Resize a Google Map

To **Resize,** select your **Google Map** and grab one of the map's four corner points. You can change the height, width, or overall size of the **Google Map** by dragging and dropping any one of the four corner points.

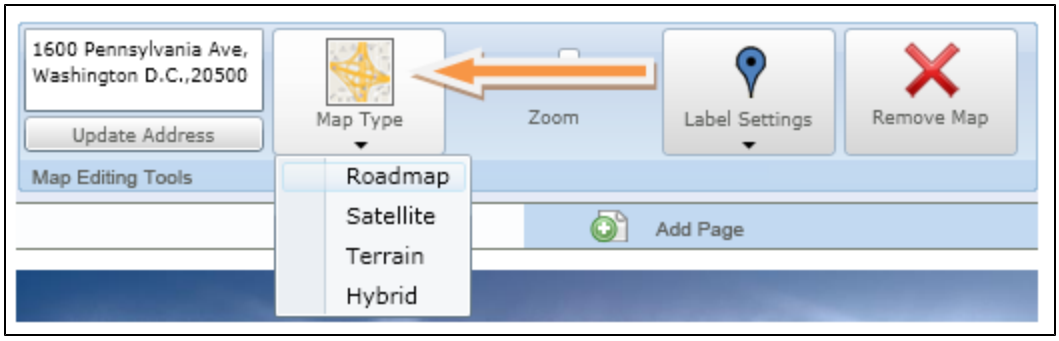


Rotate a Google Map

To **Rotate** a **Google Map,** select your **Google Map** and simply move your cursor over the green circle located on the top of your **Google Map.** Your cursor will change shapes from an arrow to a round arrow. You can then click and drag the circle to rotate your **Google Map** around a central pivot point.

Change Google Map Type

To change the **Map Type,** select your **Google Map** and click on the **Map Type** button in the **Map Editing Tools** section of the editing toolbar. Four map types are available.



Roadmap is the default **Map Type** setting. This **Google Map** displays an outline of streets and major geological features. It is easy to read and great for showing location for directions on your marketing piece.

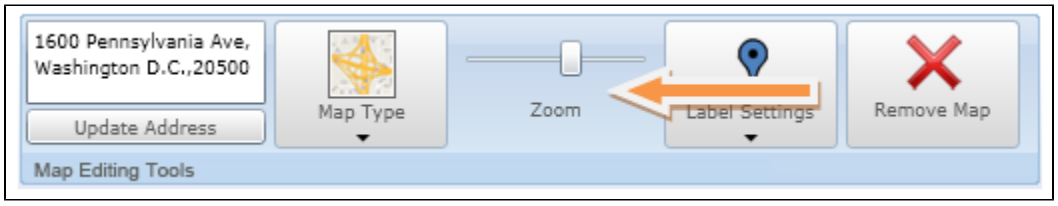
Satellite displays a **Google Map** with birds-eye satellite images of your selected location.

Terrain displays a relief map for a 3D representation of an area's terrain. Terrain maps are not available for all areas and are primarily useful in hilly areas.

The **Hybrid** map type combines the **Roadmap** and **Satellite Map Types.** The **Roadmap** names and road outlines are overlaid on the Satellite images.

Change Zoom on Google Map

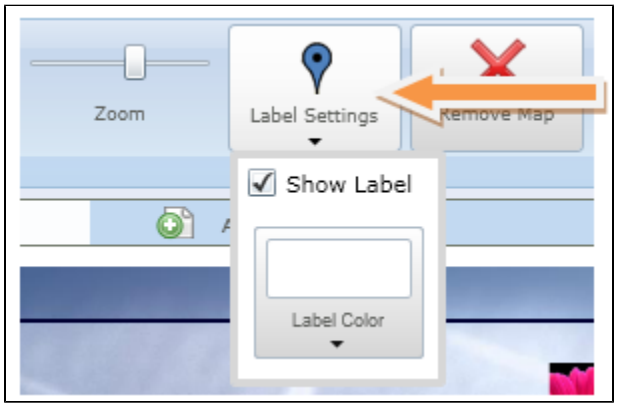
To increase or decrease the level of **Zoom** on a **Google Map,** select the **Google Map** you wish to modify. In the **Map Editing Tools** section of the editing toolbar, grab the **Zoom** slide bar and move it to the left to **Zoom Out.** Move the **Zoom**slide bar to the right to **Zoom In.** The map will always be centered on the current **Address** that was used to create the**Google Map.**



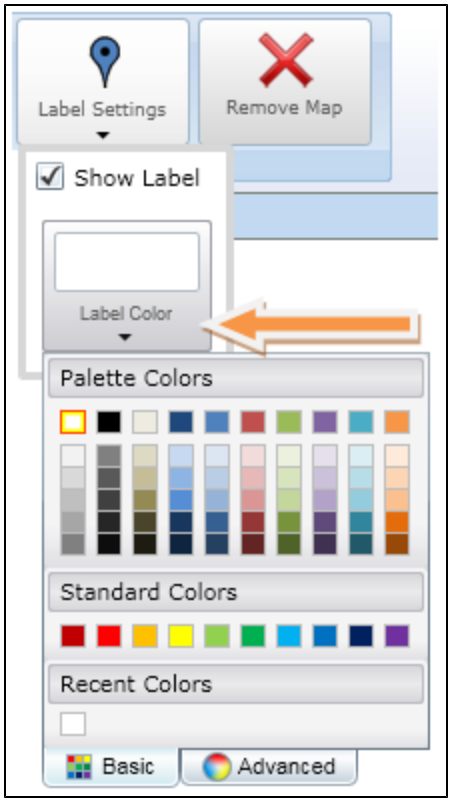
Edit Google Map Label

A **Label** is automatically added to a **Google Map** when it is created in a marketing piece. This **Label** pinpoints the address, landmark or location that created the map.

To remove the **Label,** click on the **Label Settings** button in the **Map Editing Tools** section of the editing toolbar. Then deselect the **Show Label** Box.



To change the color of the **Google Map's Label,** click on the **Label Settings** button in the **Map Editing Tools** section of the editing toolbar. Then click on the **Label Color** button. Select from one of the available label colors.



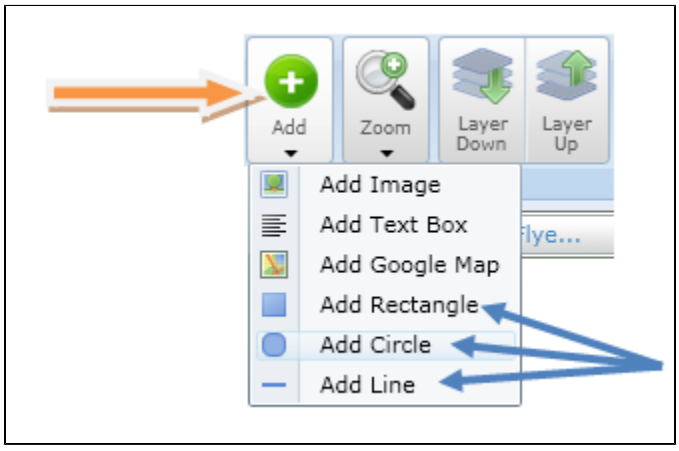
Shape Editing

Shape Editing

Add a Shape

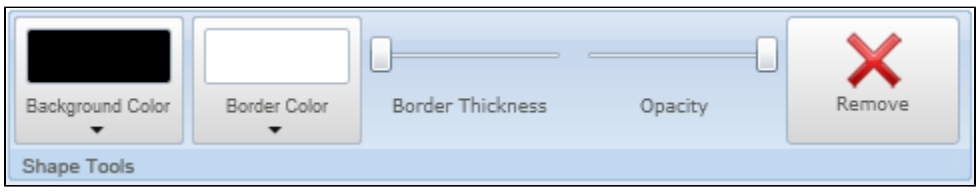
To **Add a Shape (Circle, Rectangle or Line)** first, click on the **Add** button in the **Main Tools** section of the editing toolbar. Then, select either the **Add Rectangle,Add Circle,** or **Add Line** button. A new shape will be added directly to your marketing piece.

You can then customize your **Rectangle,Circle,** or **Line Shape** with the **Shape Tools.**



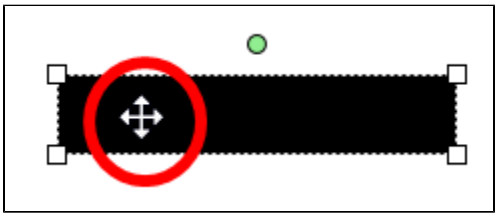
Delete a Shape

To delete a **Shape,** select the **Shape** you wish to remove. Click on the **Remove** button in the **Shape Tools** section of the editing toolbar.



Move a Shape

To **Move,** select the **Shape** and place your cursor over the **Shape** until the cursor changes from a pointer to a 4-directional arrow. Click the **Shape,** drag and drop it to the new location on the marketing piece.

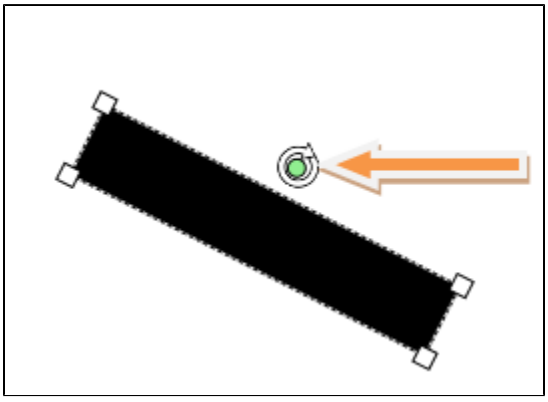


Resize a Shape

To **Resize,** select the **Shape** and grab one of the **Shape's** four corner points. You can change the height, width, or overall size of the **Shape** by dragging and dropping any one of the four corner points.

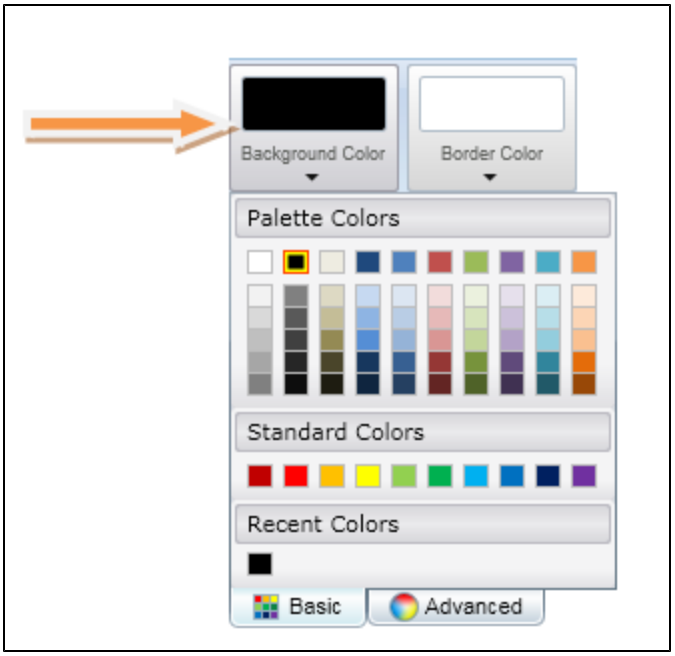
Rotate a Shape

To **Rotate** a **Shape,** select the **Shape** and simply move your cursor over the green circle located on the top of your **Shape.**Your cursor will change shapes from an arrow to a round arrow. You can then click and drag the circle to rotate your**Shape** around a central pivot point.



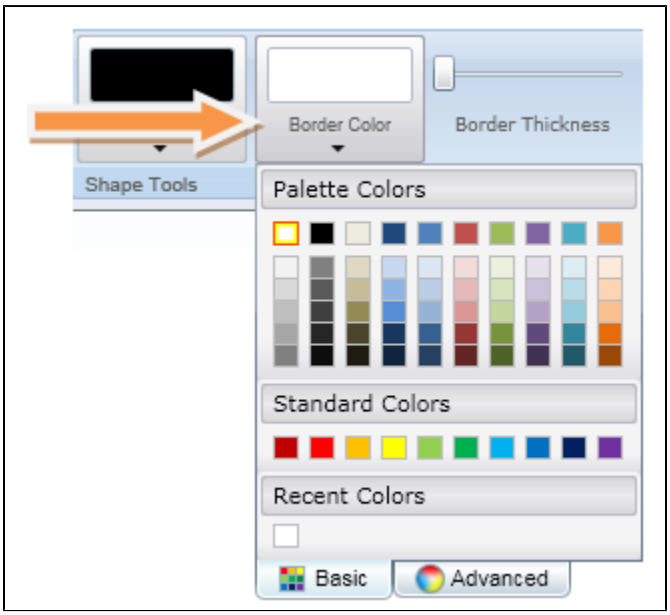
Change Shape Background Color

Select the **Shape** you wish to modify. Click on the **Background Color** button in the **Shape Tools** section of the editing toolbar. Then select the new color that you want your **Shape** to have.



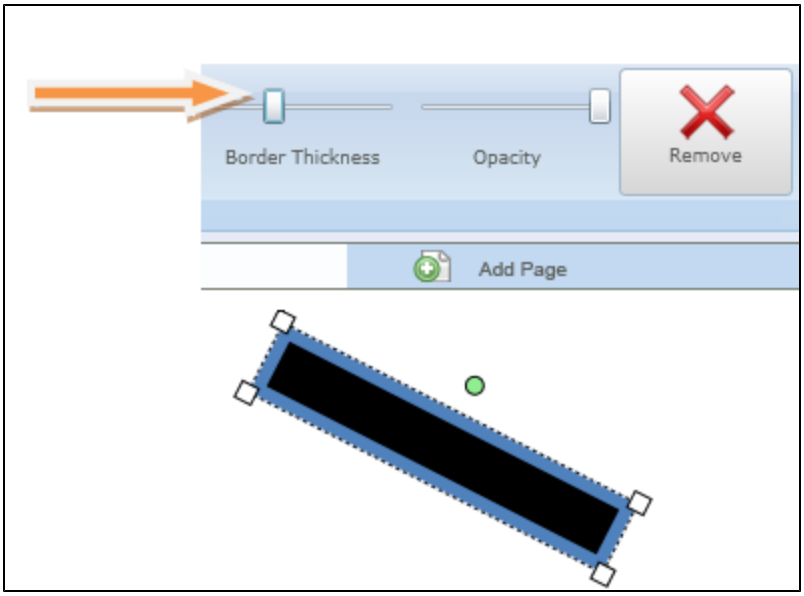
Change Shape Border Color

Select the **Shape** you wish to modify. Click on the **Border Color** button in the **Shape Tools** section of the editing toolbar. Then select the new color that you want your **Shape** to have.



Change Shape Border Thickness

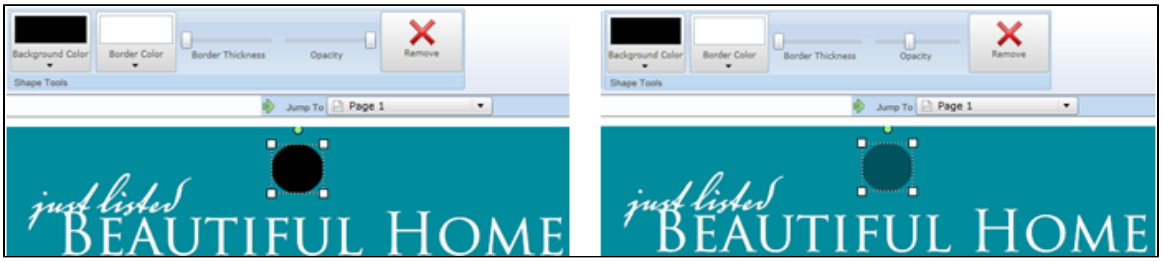
To increase or decrease the size of the border on a **Shape,** select the **Shape** you wish to modify. In the **Shape Tools**section of the editing toolbar, grab the **Border Thickness** slide bar and move it to the left to decrease the size of the border. Move the **Border Thickness** slide bar to the right to increase the size of the border. The **Shape** will remain the same size despite the thickness of the **Shape Border.**



Change Shape Opacity

Opacity is the measure of how much light is not allowed to travel through an object. You may change the opacity of a**Shape** in your marketing piece to make the shape appear as though it is more or less transparent.

To increase or decrease the opacity (or transparency) of a **Shape,** select the **Shape** you wish to modify. In the **Shape Tools**section of the editing toolbar, grab the **Opacity** slide bar and move it to the left to decrease the **Shape's Opacity.** Less opacity will make the shape appear more transparent, and you will be able to see **Images,Text** or other **Elements** in you marketing piece through the **Shape.**
Grab the **Opacity** slide bar and move it to the right to increase the **Shape's Opacity.** More opacity will make the **Shape**appear less transparent, and you will not see **Images,Text,** or other **Elements** in your marketing piece through the **Shape.**



Changing Views

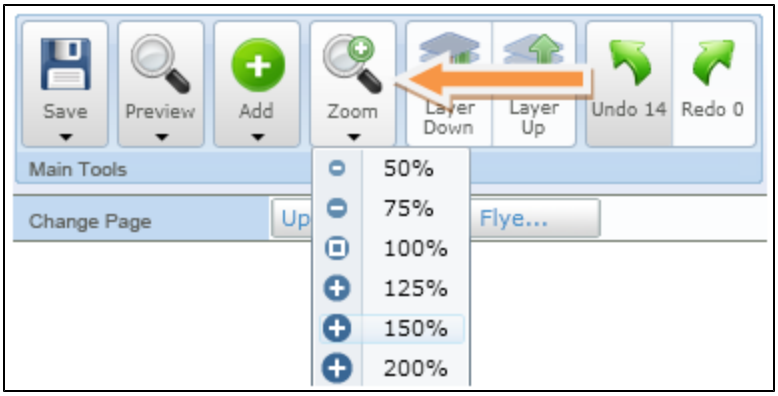
Changing Views

How to Zoom

Sometimes there may be advantages to change the view when working with a marketing piece. You can now change the view's **Zoom** while editing.

Click on the **Zoom** button in the **Main Tools** section of the editing toolbar. You'll then be able to change your **Zoom.** You can increase the view of your marketing piece to 125%, 150% or 200% of its original size to **Zoom In.** You can decrease the view of you marketing piece to 75% or 50% of its original size.

To see the piece at its original size, select 100% in the **Zoom** button.

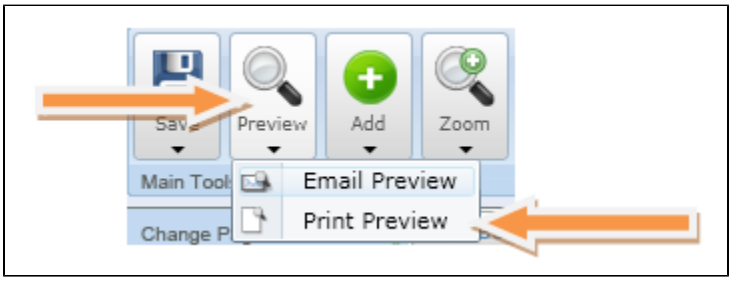


Preview a Marketing Piece

Preview a Marketing Piece

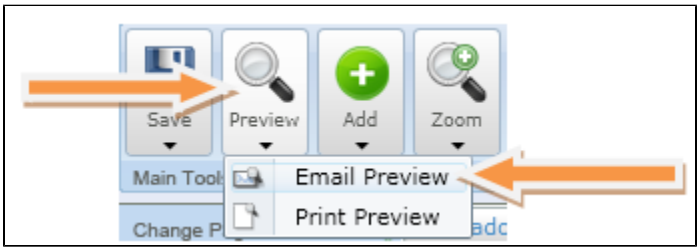
Preview Print

Ready to see how your edited marketing piece will display when printed? Click on the **Preview** button in the **Main Tools** section of the editing toolbar and select **Print Preview.** You will be able to view a PDF of your marketing piece with all current edits.



Preview Email

Ready to see how your edited marketing piece will display when emailed? Click on the **Preview** button in the **Main Tools** section of the editing toolbar and select **Email Preview.** You will be able to view a copy of your marketing piece with all current edits.



Page Controls

Page Controls

Switching pages with the Pages List

Under the **Main Toolbar** is the **Pages list.** The page you are currently viewing is highlighted. Click on any of the other pages and that page will be loaded. If there is more than 1 page, you will see arrows on the right and left of the **Pages list.** Use these arrows to scroll through the pages.

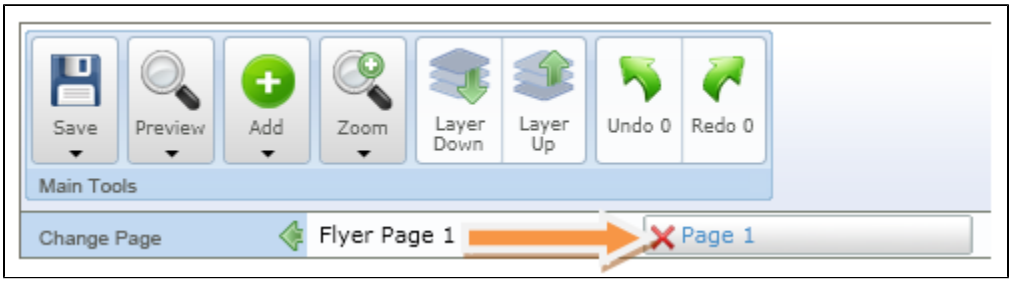
Adding a Page

If it is possible to add pages to this piece, you will click the **Add Page** button to the right of the pages list. To add a page, click **Add Page.** You will

be presented with a window showing thumbnails of the pages you can choose from to add. Select one of these pages and it will be added to the end of your piece.

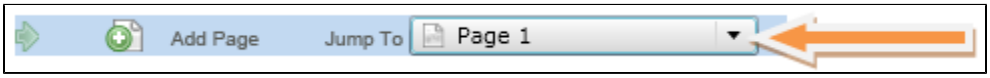
Removing a Page

You can **remove** pages that you have added. If you add a page, you will see an **X** next to the page name in the pages list. Click this **X** to remove the page. Removing a page is permanent; **there is no way to undo this action.**



Using the Jump to Menu

If you piece has more than 1 page, the **Jump** menu will show up. The jump to menu allows you to jump directly to the page you want without having to scroll through the pages list to select it. Some pieces have more than 10 pages, making the **Jump To** Menu a much quicker way to switch pages.



Marketing Materials Actions

Marketing Material Actions

In Marketing Materials, pieces display as thumbnail images in a preview area. When you click a thumbnail, Marketing Materials pops open an action window for the selected piece. Depending on the state of the piece you select, actions can include the following.

- Preview a Piece
- Edit a Piece
- Print a Piece
- Order Professional Printing
- Email a Piece
- Post to Website or Blog
- Post to Social Network
- Add to Campaign

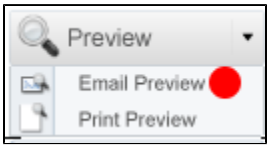
Preview a Piece

Preview a Piece

Marketing materials preview depends on the piece. Different pieces provide email, print, or both previews.

Email Preview

To see how a marketing piece will look when it is sent to your contacts via email or posted to the web, click the **Preview** button and then select the **Email Preview** option.



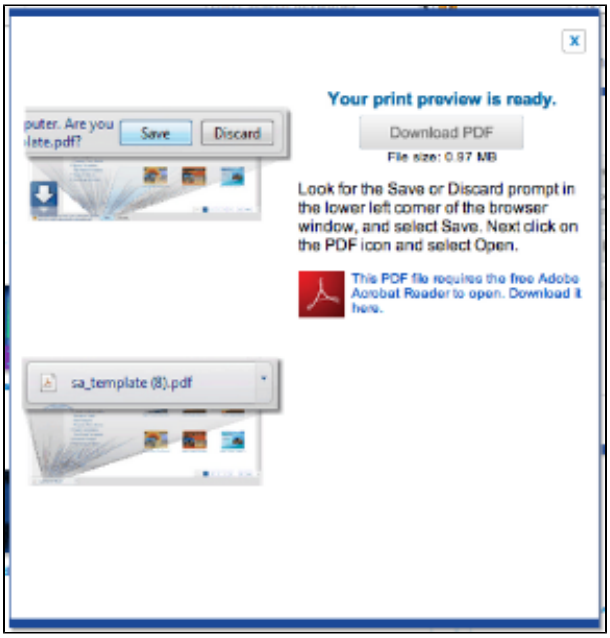
A new window will open displaying your selected piece. Close the window after you have reviewed the piece.

Print Preview

To see how a marketing piece will look when it is desktop printed or ordered for professional digital print, click the **Preview** button and then select

Print Preview.

A downloadable PDF of the marketing piece will be generated in the Print Download Window. When your piece is ready, click **Download PDF**.

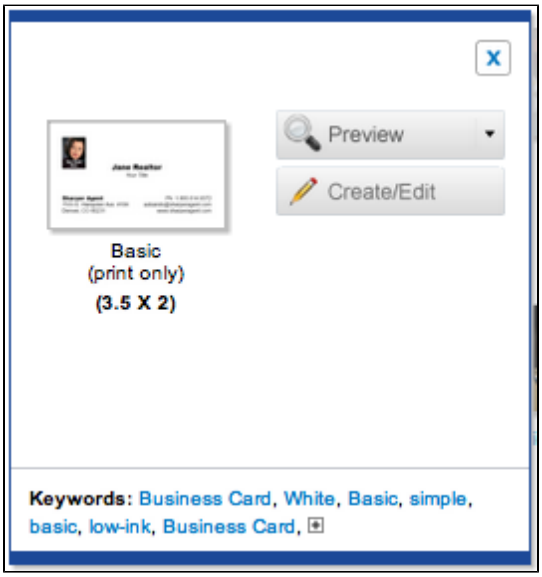


If you have trouble opening the document, make sure you have downloaded the latest version of Adobe Acrobat Reader. For more information on required software versions, refer to System Requirements - Marketing.

Edit a Piece

Edit a Piece

To **Edit a Marketing Material Template,** click on the thumbnail image of the piece that you wish to modify. This will bring up the **Template Action Window.** Then select the **Create/Edit** button. This will open up your marketing materials Editor.

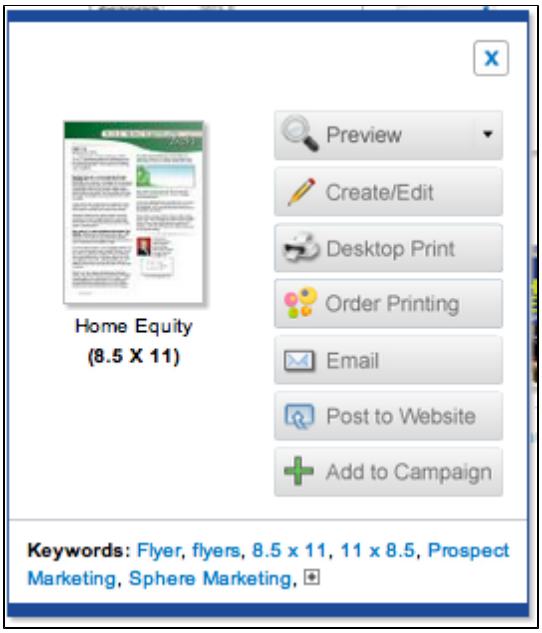


For additional instructions on editing a marketing material template, refer to Marketing Materials Editor.

Print a Piece

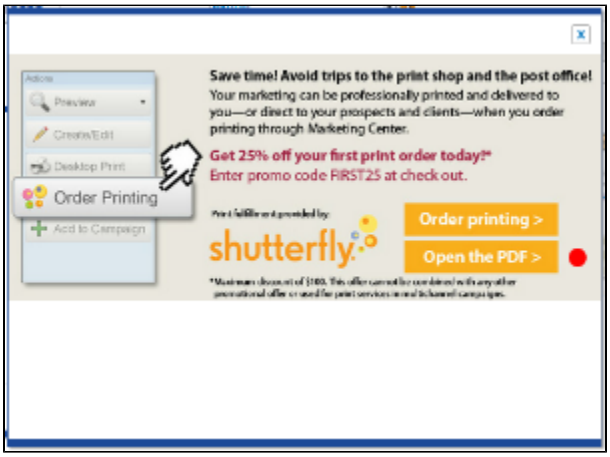
Print a Piece

To print a marketing piece on your home or office printer, click on the thumbnail image of the piece you wish to print. This will open the **Template Action Window.**



> If you are required to edit a marketing piece, you must create and save a version of the marketing piece before printing.

Click on the **Print** button and select **Desktop Print.**



A downloadable PDF of the marketing piece will be generated in the Print Download Window. When your piece is ready, click on the **Download PDF** button.

If you have trouble opening the document, make sure you have downloaded the latest version of Adobe Acrobat Reader.

> ⚠ For more information on required software versions, refer to System Requirements - Marketing.

Once you've opened the PDF you can send the piece to your personal printer by clicking on the **Print** button in Adobe Reader's main toolbar or clicking on the **File Menu** and selecting **Print.**

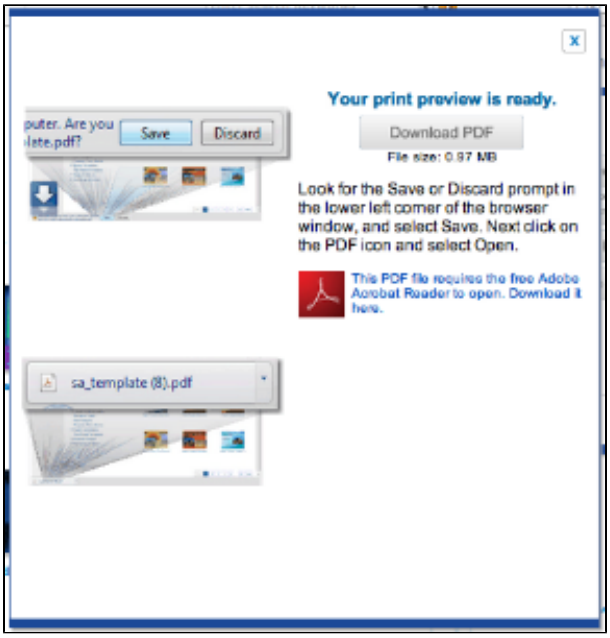
> ⚠ Some Marketing Materials such as Pre-built newsletters are two sided so you may want to know how to produce two sided prints on your system. Unless you have a printer capable of duplex printing, you will probably need to scroll to the first page, click print, enter the number of copies on the print driver and select "Current Page". Once you have printed the front pages, take them out of the printer, turn them over and put them back in the paper tray, scroll down to the second page and repeat the procedure above.

Save PDF of Marketing Material

To save a copy of your marketing material on your personal computer, download and save the **Desktop Print PDF.**
First, click on the thumbnail image of the piece you wish to save. This will open the **Template Action Window.**
If you are required to edit the marketing piece and haven't already done so, you must create and save a version of the marketing piece before printing.

Click on the **Print** button and select **Desktop Print.**

A downloadable PDF of the marketing piece will be generated in the Print Download Window. When your piece is ready, click **Download PDF.**



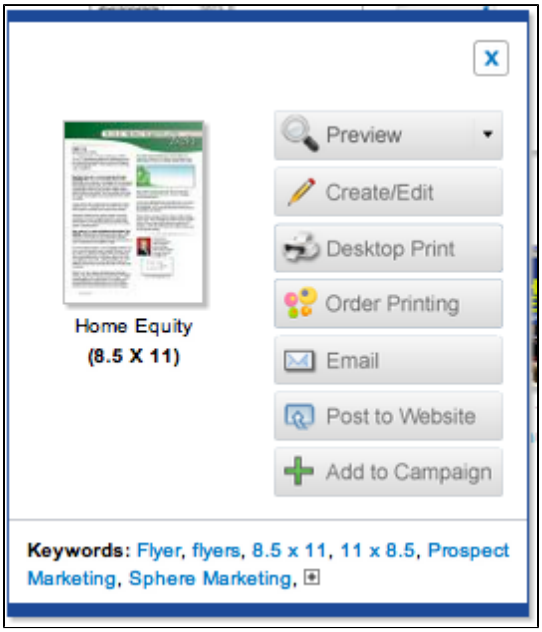
If you have trouble opening the document, make sure you have downloaded the latest version of Adobe Acrobat Reader.

When you open the PDF you can save the piece anywhere on your personal computer or shared file drive by clicking on the **Save** button in Adobe Reader's main toolbar or clicking on the **File Menu** and select **Save As.**

Order Professional Printing

Order Professional Printing

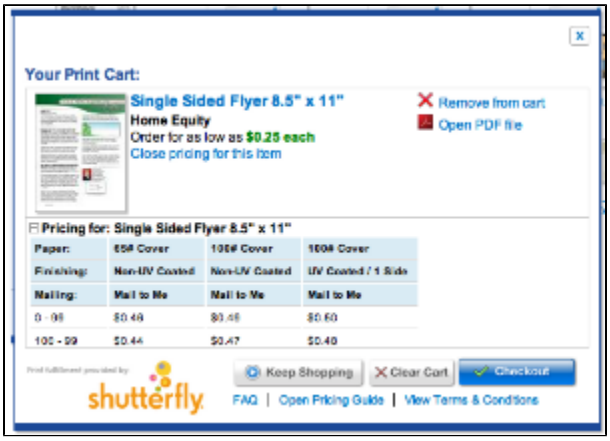
To place a print order, click on the thumbnail image of the piece you wish to purchase. This opens the **Template Action Window.**



> ⚠ If you are required to edit the marketing piece, you must create and save a version of the marketing piece before ordering print.

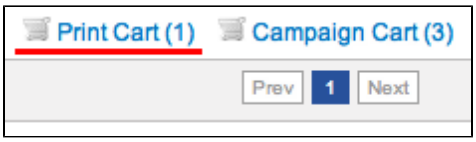
Click on the **Print** button and select **Order Print** this opens the **Print Cart Window.**

From the **Print Cart Window** you can choose to **Checkout, Keep Shopping, Add a Mailing List,** or **Review the PDF.**

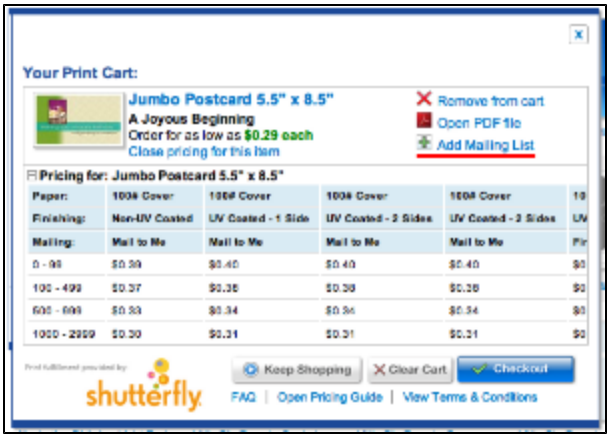


To continue with your **Print Order,** select the **Checkout** button.

To work with other marketing materials and return to your **Print Order** later, select the **Keep Shopping** button. The **Print Cart Window** closes and Marketing Materials view opens. You can access your **Print Cart** at any time by clicking on the **Print Cart** link at the top of the **Marketing Materials** section of your account.

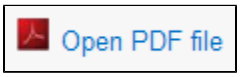


To add a **Mailing List** to your marketing piece so that it can be sent directly to your contacts, select the **Add Mailing List link.**



To review the full-bleed version of your marketing piece, select the **Open PDF File** link.

> ⚠ Printed colors which run all the way to the edge of a sheet are referred to as bleeds. The printer cuts the marketing material you have selected very near the black hash marks shown in the corners of the PDF that you have downloaded. Please ensure at this time of the review process that no desired text or images extend beyond these black hash marks.

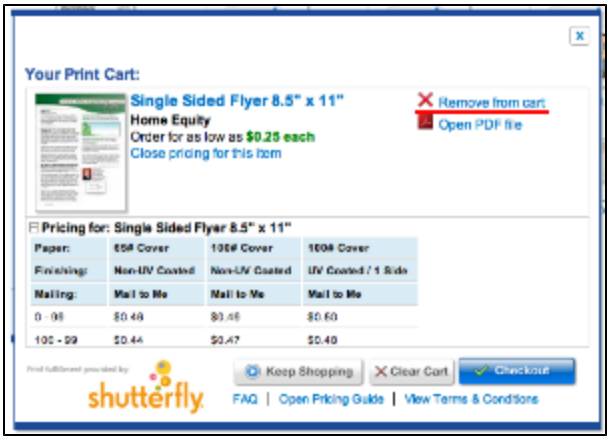


Open PDF file generates a downloadable PDF of the marketing piece. When your piece is ready, click **Download PDF** to download your file.

If you have trouble opening the document, make sure you have downloaded the latest version of Adobe Acrobat Reader. For more information on required software versions, refer to System Requirements - Marketing.

> ⚠ You must review the PDF of your print marketing piece in the **Print Checkout** Cart while placing your final order to ensure there are no errors before submission.

To remove any marketing piece from your **Print Cart,** select the **Remove from cart** link or click on the **Clear Cart** button.



See Also

- Print FAQ
- Print Pricing
- Terms and Conditions

Print FAQ

Print FAQ

For common questions asked of support, refer to the following.

What is the order **minimum?**

- Providing flexible, low minimums is one way that Market Leader sets itself apart from the others. The minimum *quantity*for each line item is 25 pieces.
- For bulk mail, the minimum total order *amount* is $30 per order. First Class and Standard Mail do not have a minimum amount; they only need to meet the minimum quantity of 25.
- You may mix and match to get to the minimum order amount, but may not group different pieces to obtain price break points.
- Minimum line items do not apply to leather bound photo books, calendars, or guides.

How will I receive my order?

- In the US, we include UPS Ground Shipping for all orders shipped directly to you (note: not available to ship to PO Boxes). You can also choose to upgrade to UPS 2-Day™ or UPS Next Day Air Saver™. We use USPS First-Class™mail for all Print + Address + Mail orders.
- In Canada, “Mail to Me” orders will be shipped directly to you, the agent, via UPS Worldwide Saver. Pieces mailed directly to your contacts will be sent via Canada Post.
- Shipping to Mexico is not supported at this time.

Where can I view the status of my order?

- To view the details and status of your order, go to Admin, click on My Account, then click on Orders. The status of your order and any available shipping information is displayed

When will my order ship?

- Orders received before 7 A.M. Pacific Standard Time are shipped the same business day (some restrictions apply).
- The operating schedule is Monday - Friday. All orders must be received on or before a business day for turnaround times to apply.
- **Important:** Turnaround times are based on business days excluding holidays. Any problems with your order will delay delivery. Orders we do not mail on your behalf are shipped to you via UPS to the shipping address on the order (excludes weekends - AK and HI have longer transit times). Orders we mail on your behalf are shipped via USPS to the list you attached to your order.

When will I receive my order?

- Orders submitted by 7 A.M. Pacific Standard Time will generally be shipped the same business day, and will be shipped UPS Ground unless you choose 2-Day or Next Day Air Saver (some restrictions apply).
- **UPS Ground Delivery Times:** 2-7 business days by 3:00 or 4:30 P.M. to most U.S. addresses.

- **UPS 2-Day Delivery Times:** 2 business days by 3:00 or 4:30 P.M. to most U.S. addresses.
- **UPS Next Day Air Saver Overnight Delivery Times:** Next-business-day delivery by 3:00 or 4:30 P.M. to most U.S. addresses.
- **Canada: UPS Worldwide Saver Delivery Times:** 1-3 business days by 3:00 or 4:30 P.M. to most Canada addresses.
- **Canada: Direct mail:** 2 week turnaround to most Canada addresses.
- **Service Days:** Monday-Friday. Saturday delivery is not an option at this time.
- **Exceptions:** Delivery to many areas of Alaska and Hawaii may not meet the above delivery timelines.

If I am mailing my postcards First Class what is the delivery time?

- Orders placed before 7 A.M. Pacific Standard Time will be processed and delivered to the Post Office the next business day. While delivery times may vary based on destinations, most deliveries will be made within 1-7 business days.
- Turnaround times are an estimation of processing time required to fulfill your order and are not guaranteed.

Can I include both US and Canadian addresses in the same print request?

- At this time, all the addresses in the shipping file must be either Canadian OR US in order to ship. If there are both US and Canadian addresses, then the order cannot be fulfilled.

Where are Print + Address + Mail orders actually mailed from?

- Phoenix, AZ

Can I schedule my printing for a later date?

- At this time there is not an option to pre-order your pieces for a later date.

What paper option should I choose?

- **65# Cover** is a great application for professional looking brochures, flyers and newsletters. Its coating makes color and text really stand out compared to traditional bond paper. It is easily folded for newsletters and truly exhibits the professionalism in your piece.
- **100# Cover** is our heavy stock paper for all of our postcards and our heavy flyers, and is the heaviest standard paper option in the market. Its heavy weight and 96 brightness offers the quality our users seek in a final product and adds that extra level of quality to direct mailing pieces.
- **14 Point Card Stock** is our heaviest paper stock and is used on our business cards, folded greeting cards and door hangers.

What finishing option should I choose?

- **UV Coating - 2 Sided:** Postcard orders placed for addressing and mailing first-class are recommended to have a UV Coating applied to both sides of the postcard, to provide the highest level of print finishing and protection during the postal delivery process. If you are looking for your pieces to stand out and survive the trip through the postal system, this is the way to go!
- **UV Coating - 1 Side:** You're interested in having Market Leader Printing produce your postcard and mail it back to you so that you can affix labels, hand write addresses, print addresses from your desktop and send them on your own? Choose this option so that your labels and stamps affix properly and your addresses don't smear. You gain the professionalism of having a high quality image finish on the front with the flexibility of sending them how and when you desire! *You can also UV Coat your flyers and brochures to provide added protection where you see fit.
- **Folding:** You may notice that on our newsletters and some of our property brochures that this option has been pre-selected. We will put the right fold in the right place, every time, saving you the hassle of doing it later. Pieces that require scoring prior to folding will be scored to provide a high quality finish. You can always choose to fold it yourself after it has been delivered to you. Just select "Mail Flat" to do so.
- **Tabbing:** Want your folded newsletter or brochure sealed? We will add a "sticky dot" to your piece at the bottom to keep it closed for you.

Print Pricing

Print Pricing

For details of print order pricing, please refer to the following PDF.

You need flash player installed to preview ppt and pdf files

Terms and Conditions

Terms and Conditions

PRINT SERVICES - ADDITIONAL TERMS

Please note that these terms are in addition to the terms applicable to your Market Leader subscription and all the terms applicable to such subscription apply to your purchase of any print services.

In providing print services, neither Market Leader nor its print suppliers acts as an agent, partner, joint venturer, or in any other capacity on your behalf or on behalf of the United States Postal Service ("USPS") or any other parcel carrier. Orders are processed and shipped within 24 – 48 hours on normal business days, however Market Leader makes no guarantees in this respect. All issues related to delivery of mail are matters solely between you and USPS, Federal Express, or any other carriers.

Unless otherwise specified, the print services are provided as is and no refunds will be issued unless there is a defect in the product caused by Market Leader or its supplier and you have notified Market Leader of such defect within 30 days of receipt of the defective product.

YOU REPRESENT AND WARRANT THAT YOU HAVE THE LEGAL RIGHT TO USE ANY CREDIT CARD(S) OR OTHER PAYMENT MEANS USED TO INITIATE ANY TRANSACTION. You agree to pay all charges incurred by you or any users of your account and credit card (or other applicable payment mechanism) at the prices in effect when such charges are incurred. You will also be responsible for paying any applicable taxes relating to your purchases. Verification of information applicable to a purchase may be required prior to our acceptance of any order.

Descriptions, images, references, features, content, specifications, products, price and availability of any products or services are subject to change without notice. We make reasonable efforts to accurately display the attributes of our products, including the applicable colors; however, the actual color you see will depend on your computer system, and we cannot guarantee that your computer will accurately display such colors. It is your responsibility to ascertain and obey all applicable local, state, federal and international laws (including minimum age requirements) in regard to the possession, use and sale of any item purchased through the service. By placing an order, you represent that the products ordered will be used only in a lawful manner. We reserve the right, with or without prior notice, to limit the available quantity of or discontinue any product or service; to bar any user from making any or all purchase(s); and/or to refuse to provide any user with any product or service.

Title and risk of loss for any purchases pass to you upon our delivery to our carrier. We reserve the right to ship partial orders.

Email a Piece

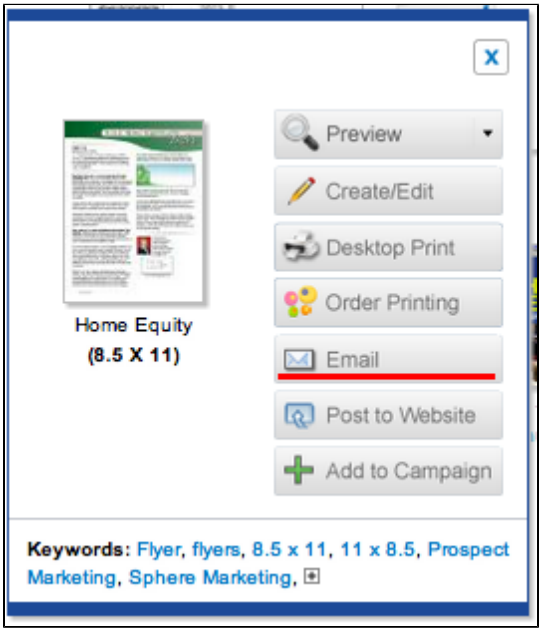
Email a Piece

For a 5-minute tutorial on how to email a marketing piece, watch the following video.

Email a Marketing Piece

To send a marketing materials email, click on a thumbnail image of the piece you want to deliver. This opens a **Template Action Window.**

Click on **Email** to open a **Send Email** view**.**



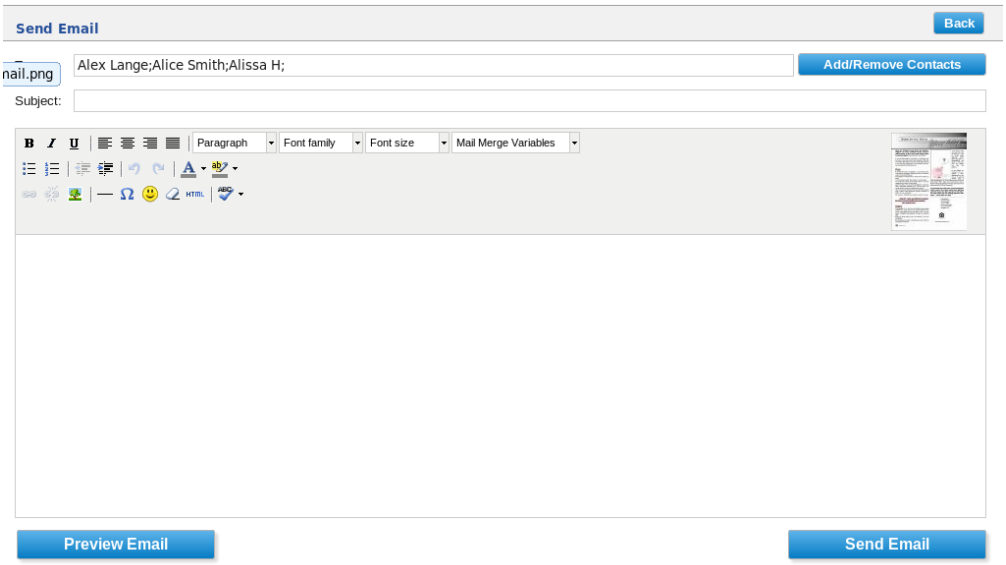
If you are required to edit a marketing piece, you must create and save a version of the piece before you can email it.

The **Send Email** view presents a familiar looking email form with **To**, **Subject**, and body fields. Using an **Add/Remove Contacts** button, you can select contacts individually or by Group(s). Select who you want to send this email to by checking a box to the left of one or more contacts or groups and then click **Add**. When you are finished selecting contacts, click **Done**.
The selected contacts appear in the **To** field. You can add a subject line, rich text in the body of the email, and Preview the email prior to distribution.

The rich text editor includes an Image Library icon ( ) that enables you to insert an image in an email as follows.

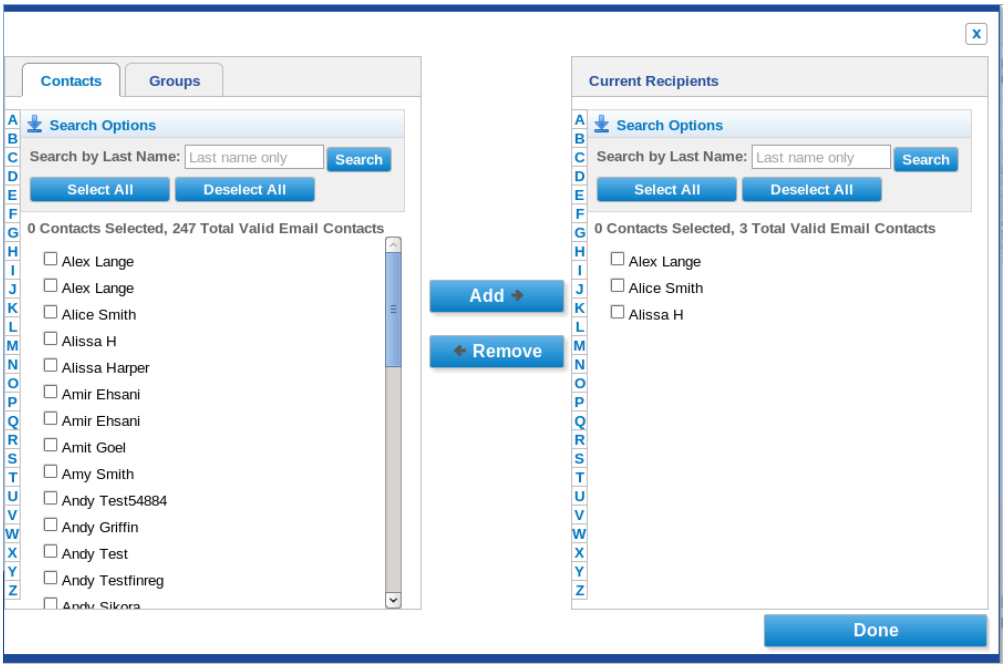
1. Click Image Library.
2. In My Pictures, select an image.
3. Click Use.
4. If necessary, adjust size, alignment, and other values.
5. Click Insert Image.
   If you want to redo the image insert, place the cursor after the image, press Backspace, and try again.

To send the email, click **Schedule Email** or **Send Email**.



To **REMOVE** contacts from the **To** field, click **Add/Remove Contacts**, uncheck a box to the left of a name, and click **Remove** then **Done**.

You can toggle between a contact list or Groups list by clicking the tabs at the top of the list. So for example, you can click **Groups,** select a group and click **Add,** and then send the email to all of your contacts in that group.



See Also

- Add Sender to Safe List

Add Sender to Safe List

Add Sender to Safe List

On certain marketing emails, a contact can click a link for directions. When they visit the link, the browser displays a page that describes how to configure email applications to help prevent your emails from being blocked. You can view the page directly with the following URL.

```
http://docs.marketleader.com/display/chkwv1/Add+Sender+to+Safe+List
```

Post to Website or Blog

Post to Website or Blog

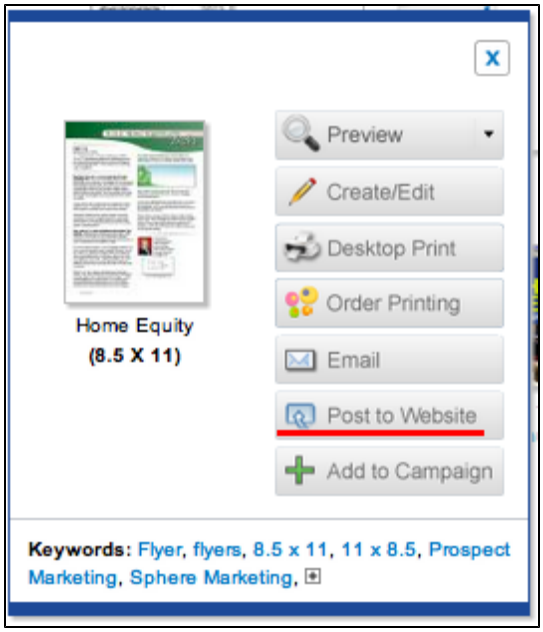
For a 5-minute tutorial on how to post a marketing piece to a website or social network, watch the following video.

Post to Website or Social Network

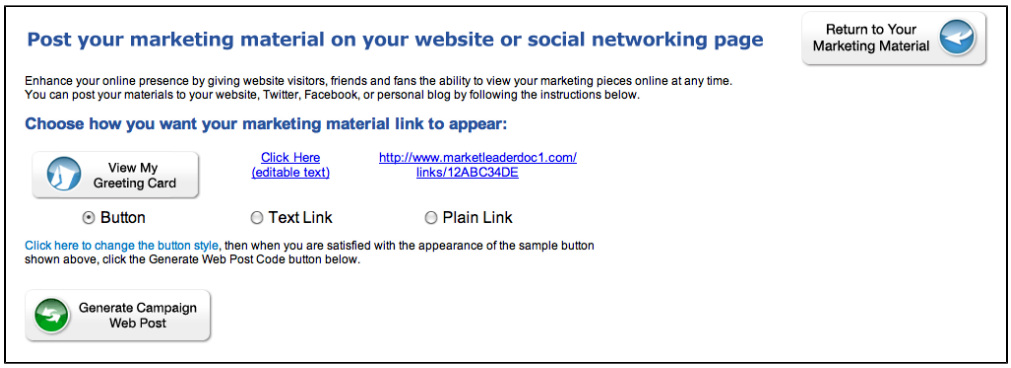
To add a button or link to a marketing piece on your website, blog or social networking site, click on the thumbnail image of the piece. This will open the **Template Action Window.**

> ⚠ If you are required to edit the marketing piece, you must create and save a version of the marketing piece before posting it online.

Click on the **Post to Website** button. This will open the **Web Post Tool.**



You have the option to choose from three different ways to display the link to your marketing piece.



1. Button
   Choose the button style to display a pre-designed graphic button that your website visitors will see and click to view your marketing piece. You can change the look of the button by clicking on the **Button** style link.
2. Text Link
   Choose the text link style to display a link in your own words. You also have the option of changing the color of the text to white or black.
3. Plain Link
   Choose the plain link style if you do not want to generate additional HTML for your website posting. This option is preferable if you are posting to places like Facebook and Twitter or if you want to build your own HTML code for the posting.

After you have selected your preferred link appearance, click on the **Generate Campaign Web Post** button.

After the web post code is generated, hit Ctrl-C or right-click on the selected code to copy. You can then paste the code directly to your website or blog. If you are not familiar with HTML, have your web developer add the code for you.

Post to Social Network

Post to Social Network

Marketing Materials support posting to popular social networks. For specific networks, refer to the following.

- Post to Facebook
- Post to Twitter

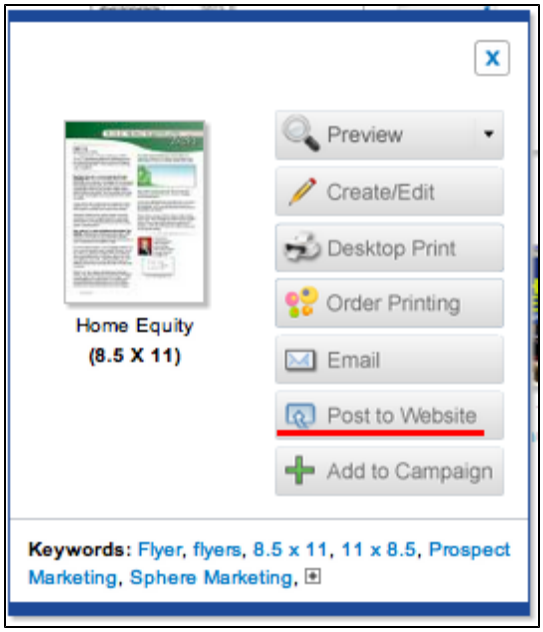
Post to Facebook

Post to Facebook

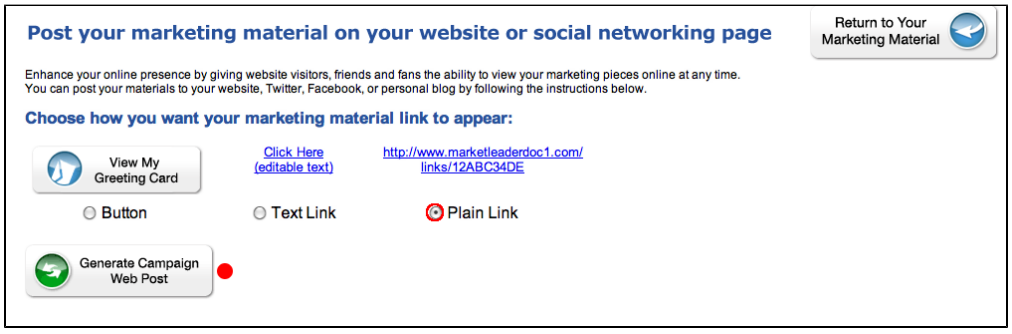
To post a marketing piece, click on the thumbnail image of the piece. This will open the **Template Action Window.**

⚠	If you are required to edit the marketing piece, you must create and save a version of the marketing piece before posting it online.

Click on the **Post to Website** button. This will open the **Web Post Tool.**



To post a piece on Facebook, you'll need to select the **Plain Link** option on how you want your link to appear. Click the **Generate Campaign Web Post** button. After the web post code is generated, hit Ctrl-C or right-click on the selected code to copy.



Paste this code into a wall post, status update or on your fan page.

For the latest information on posting links in Facebook, please consult the Facebook Help Center on http://www.facebook.com/

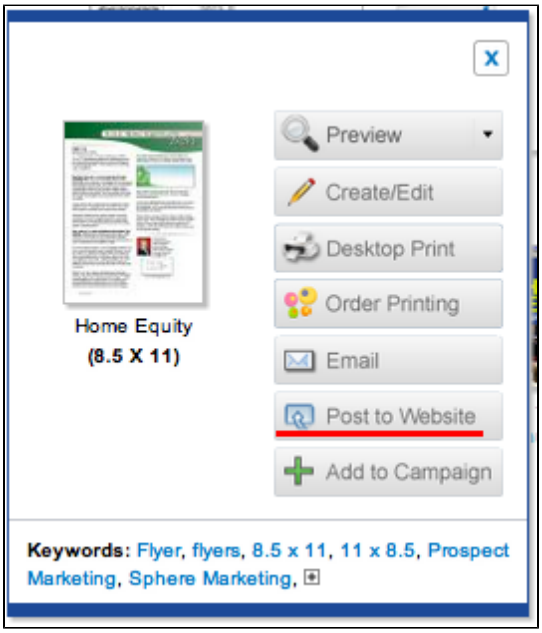
Post to Twitter

Post to Twitter

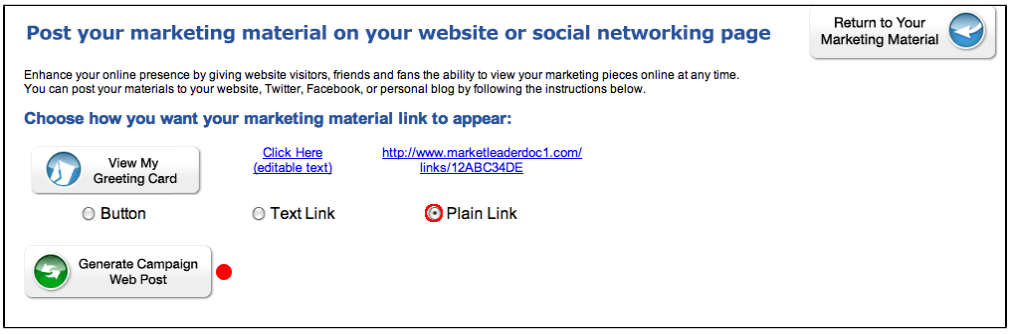
To include a link to a marketing piece in a Twitter post, click on the thumbnail image of the piece. This will open the **Template Action Window.**

⚠	If you are required to edit the marketing piece, you must create and save a version of the marketing piece before posting it online.

Click on the **Post to Website** button. This will open the **Web Post Tool.**



To generate a link for Twitter, you'll need to select the **Plain Link** option on how you want your link to appear. Click the **Generate Campaign Web Post.**
After the web post code is generated, hit Ctrl-C or right-click on the selected code to copy.



After the web post code is generated, hit Ctrl-C or right-click on the selected code to copy. Paste this code into your Tweet.

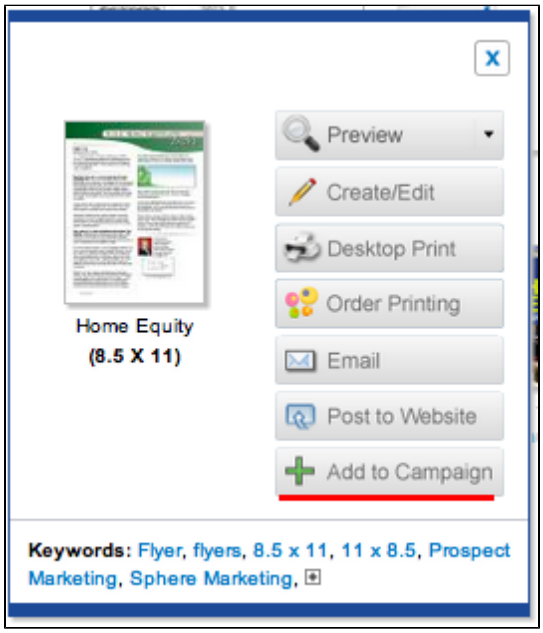
For the latest information on posting links on Twitter, please consult the Twitter Help Center at http://www.twitter.com/.

Add to Campaign

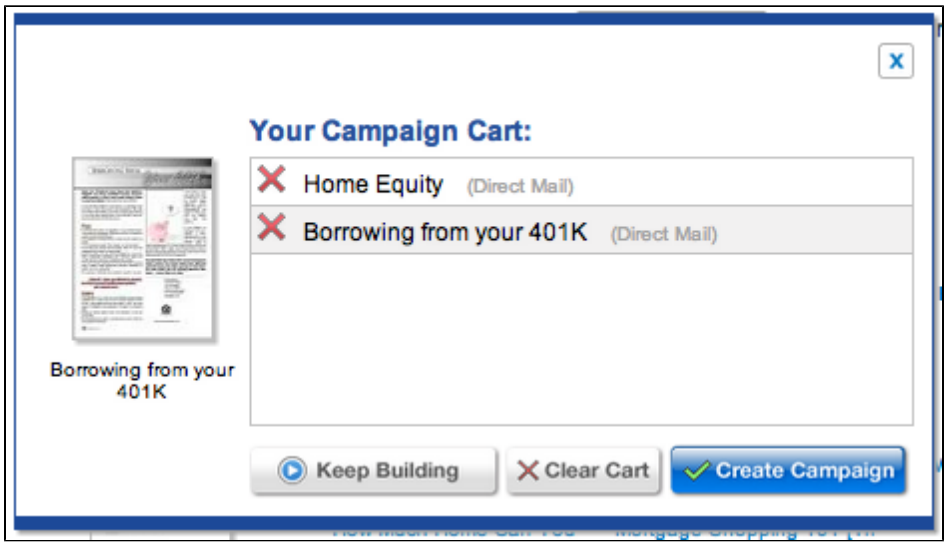
Add to Campaign

You can add most pieces in **Marketing Materials** to an Email Campaign, a Direct Mail Campaign or a MultiChannel Campaign.

To add a marketing piece into an automated marketing campaign, click on the thumbnail image of the piece. This opens a template action window. Click **Add to Campaign** which opens a **Campaign Cart.**



To add additional materials to an automated campaign, click **Keep Building**. To refine and launch an automated marketing campaign, click **Create Campaign**. For more information on creating a campaign, refer to Campaigns.



Marketing in Motion

Marketing in Motion

For a quick tutorial on how to create a virtual home tour using Marketing in Motion, watch the following video.

Create a Virtual Home Tour

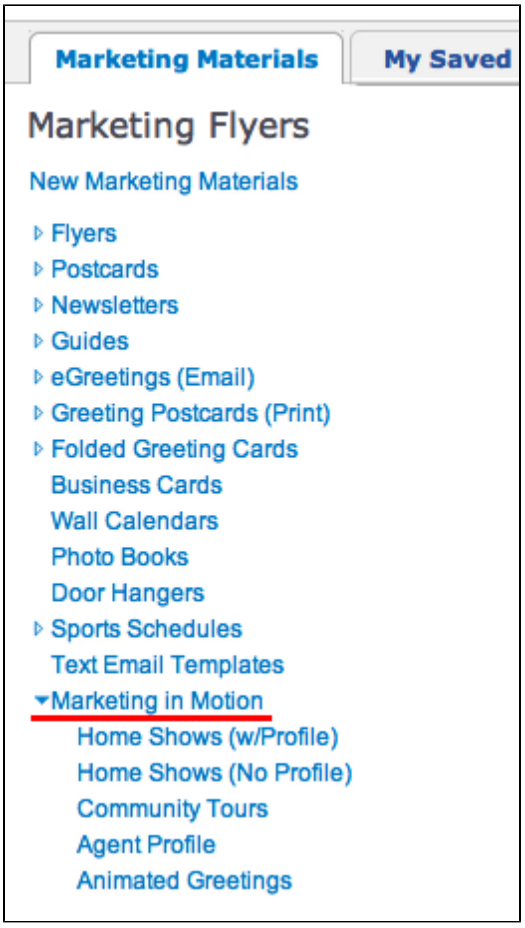
Marketing in Motion provides tools to create dynamic pieces with slide shows, music, and other visual effects. For more information, refer to the following topics.

- Selecting a Template to Edit
- Create or Edit Preview
- Marketing In Motion Editor

Selecting a Template to Edit

Selecting a Template to Edit

In order to get to the **Marketing In Motion** templates from the main page, click on the **Marketing Materials** button from the left navigation menu in your account. Then click on the **Marketing In Motion** From the Marketing Materials list. Now you can select the appropriate link for the template selection that will most closely match your presentation needs. This will bring you to the Marketing Presentations templates associated with that category.



At this point if you don't already have Adobe Flash Player in stalled you will be prompted to upload the Adobe Flash Player. Please follow the directions in the System Requirements.

Once you navigate through the previous steps, you see a selection of marketing pieces to choose from. You can select from Marketing Materials or from My Saved Pieces. The marketing pieces in Marketing Materials include labels that indicate a theme. When you save a piece you can title

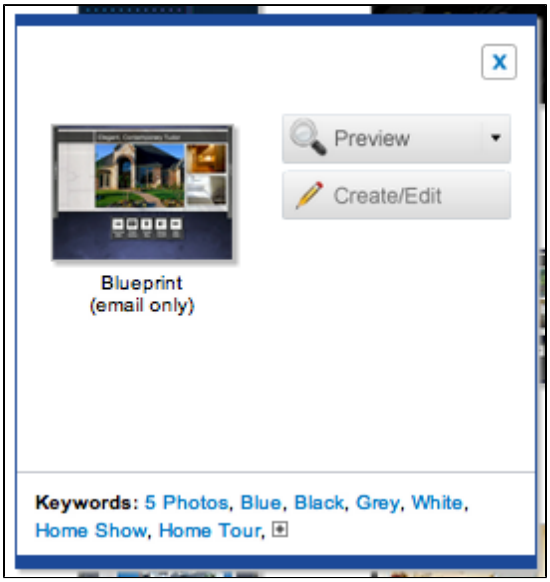
it anything you want. You can find the piece in **My Saved Pieces** with that name.

Create or Edit Preview

Create or Edit Preview

To **Create/Edit** or **Preview** a piece, you must first select it. When working with marketing pieces, you can either select from **Marketing Materials** or from **My Saved Pieces**.

When you select a piece from **Marketing Materials**, the application provides the following options. From this view, you can **Create / Edit** or **Preview** a presentation**.**



When you select a piece from **My Saved Pieces,** you can choose to **Create / Edit, Preview, Email, Post to Website,** or **Delete** the piece.

Regardless of which template you select, once you select **Create/Edit,** the piece opens in Marketing In Motion Editor.

Marketing In Motion Editor

Marketing In Motion Editor

This is the **Marketing In Motion** editor page. On this page you can edit slides, text, music and pictures. You can use the edit controls at the top of the screen to modify the presentation or you can click a highlighted area of the presentation to the left to change the content of the presentation.

The Helpful hints frame can be found in the top right hand corner of the Marketing In Motion editor page. This will display helpful hints regarding the frame you are currently in or working on. There is an EXIT button in this frame. Clicking on this button will exit you out of the Marketing In Motion editor. Once you click on it you will be reminded to save your work or be allowed to cancel the request to exit. The frame directly under this one will also provide helpful hints regarding the various options available at this point in your presentation creation.

For more information on Marketing in Motion Editor, refer to the following topics.

- Edit Action Buttons
- Editor Panes
- Working with Saved Templates

Edit Action Buttons

Edit Action Buttons

Use the edit controls located at the top of the screen to add and remove slides in your presentation. These are the Edit Action Buttons. (NOTE: Edit Action buttons do not function if you are in the process of editing an element in your marketing presentation. If you receive a message that the function is disabled while you are editing, click on the **DONE** button at the bottom of your editing box and try again.)

Preview

The "Preview" button launchs a preview of the slide show presentation. This shows you exactly what your e-mail recipient sees when they click the "Take Virtual Tour" link in your email or view your web post.

Save

Save enables you to save changes as you work. If you are saving your work for the first time, the editor prompts you to name your presentation. Once you save your presentation, subsequent saves overwrite the previously saved presentation with the new version. Make sure you save often!

> If you save your presentation without editing all of the slides in it, you receive a warning that you saved unedited slides and you should complete editing them with your own materials before you send the presentation out.

Save As

Save As enables you to save an existing presentation under a new title. Your existing presentation still exists under its original title and the new presentation exists with the changes you made prior to selecting **Save As**.

⚠ Before you save your marketing presentation, preview and check **I have previewed the presentation**. If you attempt to save the presentation without checking this, you receive a reminder to preview your work and then check the box.

Current Slide

The **current slide** indicator tells you where you are in your presentation. It lists a slide number following the total number of slides in the presentation or it indicates that you are currently on the summary slide. The summary slide does not count as a slide in the presentation.

Navigation

As you navigate through the Marketing In Motion editor, clicking **Summary** brings you back to a summary slide. When the presentation is completed, the summary slide is the final slide at the end of a presentation. This slide is meant to be used as a closing to a presentation where you summarize the content of your presentation. The images and data you use here appear in an email that is sent to your recipient(s).

⚠ The images on a summary slide do not appear in a photo box or thumbnail pane.

Previous and **Next** either take you back to a previous slide or advance you to the next slide. You can continue to click on either button to advance all the way through the presentation to the beginning or the end.

Composition

Add and **Remove** enable you to compose a presentation by adding and removing slides. When you add a slide to a presentation, the editor adds the slide to the end of the presentation. When you remove a slide from a presentation, the editor removes the last slide. Slide additions and removals occur sequentially from the end of the presentation. It is a good idea to preplan the sequence in which you want slides to appear before adding images and text.

Music

When you click the music button you can select specific music for a presentation. The frame at the right of the screen brings up a sound file tree from which to select sound choices. Sounds are filed within categories based on music themes. Once you select the music of your choice, a pop-up window asks if you want to set the sound. When you click **Yes**, you can preview the presentation with the sound. You cannot preview the presentation with the sound unless you set the sound. You may change and re-set the sound as many times as you want before you finally save a piece.

Editor Panes

Editor Panes

The editor view defines the following panes that enclose display and functionality features.

Template Pane

The Template Pane is the frame that shows the actual marketing presentation template. Once you have selected a slide to edit, wait until it is fully loaded on the screen. Then move your mouse on top of the portion of the slide that you wish to edit and click on it. This brings up an Image box, a text box and a description box in the Edit Element Pane to the right or a Text Editor box, depending on which portion of the slide you are editing.

Edit Element Pane

When you highlight and click an element in the template pane the edit element pane changes and give you the tools necessary to edit the element. If you select a text element in your slide you is presented with a text editor so you can change the text. This portion of text is seen on the slide show presentation. If you select an image element you are presented with your library of saved images to choose from as well as the opportunity to upload a new image to your library for use. In templates with a PhotoBox/Thumbnail feature, when you select an image you will also be presented with a "Caption" and "Description" field. This text will appear under the image in the PhotoBox/Thumbnail section. These fields will only be seen in the PhotoBox/Thumbnail feature. When you change the photo you will see it appear in the PhotoBox/Thumbnail section and when you click "Done" you will notice it also added in to your slide in the position you selected. Remember to click on the Done button at the bottom of the Edit Element Pane each time you make changes to a slide. You must do this in order to activate the Edit Action Buttons at the top of the screen.

Photo Box/Thumbnail

The Photo Box/Thumbnail feature is only available in some templates. This is a feature that allows a consumer to navigate all the images you add to your presentation without the animation. You simply click a thumbnail and a large version of the image appears along with a caption and description. When changing an image in a slide you will see the Photo Box/Thumbnail section appear in the template. Once you select an image and type a caption and description you will see them appear in the Photo Box/Thumbnail section. When you click the "Done" button the Photo Box/Thumbnail section will go away and you will see that the image you selected is now in the slide as well. Remember the text you insert into the "Caption" and "Description" fields will only appear in the Photo Box/Thumbnail section of your presentation and not in the slide. Some slides require more than one image field to be populated. There is an image in the Photo box/Thumbnail for every image. If you use the same photo in multiple image fields, that photo will appear in the Photo box/Thumbnail multiple times as well.

Working with Saved Templates

Working with Saved Templates

When you navigate through categories via previously listed steps, you see a selection of saved pieces in **My Saved Pieces.** You can also access Marketing Materials from File Manager on the Marketing menu.

Create or Edit

When you select a piece from **My Saved Pieces**, you can choose to create/edit, preview, email, post to website, or delete. **Create or Edit** opens Marketing In Motion Editor.

Preview

Preview launches a slide show presentation. This shows you exactly what an e-mail recipient sees when they click the link in an email or view a web post.

Email

The email you send matches the template you selected with a link to the presentation. The data from the summary slide of a presentation merges into the email. The email directs the recipient to a button that enables them to see a **Virtual Home Tour.**

Campaigns

Campaigns

For a quick tutorial on how to add a custom piece to a pre-built campaign, watch the following video.

Add Piece to Campaign

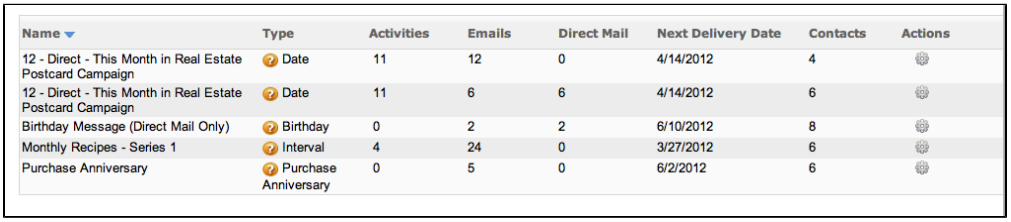
Campaigns enable you to plan ahead and send emails and/or direct mail marketing pieces to contacts on a predefined schedule. To get started, click **Build a New Campaign**.

Depending on what MarketLeader product type you have, Campaigns include the following functionality.

- Build a New Campaign - Basic
- Build a New Campaign - Advanced
- Build Your Own Campaign
- View Transactions and Manage Prepaid Accounts
- Edit Existing Campaigns

What is the difference between building a Basic and an Advanced Campaign? Building a basic campaign enables you to select a pre-built campaign and add contacts to it in only *two* steps. Building an advanced campaign enables you to select a pre-built campaign and completely customize it or build a campaign from scratch in *four* steps.

If you already set up campaigns, you see a view as shown in the following graphic. The view gives a summary of campaigns including Name, Type, Activities, Emails, Direct Mail, Next Send Date, and Contacts you have in each campaign. You can organize your Campaigns by clicking a column name.



Name	Type	Activities	Emails	Direct Mail	Next Delivery Date	Contacts	Actions
12 - Direct - This Month in Real Estate Postcard Campaign	Date	11	12	0	4/14/2012	4	
12 - Direct - This Month in Real Estate Postcard Campaign	Date	11	6	6	4/14/2012	6	
Birthday Message (Direct Mail Only)	Birthday	0	2	2	6/10/2012	8	
Monthly Recipes - Series 1	Interval	4	24	0	3/27/2012	6	
Purchase Anniversary	Purchase Anniversary	0	5	0	6/2/2012	6	

Build a New Campaign - Basic

Error: RuntimeException occurred while performing an XHTML storage transformation (null)

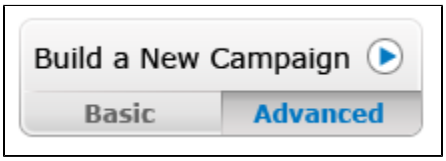
Build a New Campaign - Advanced

Setting up an Advanced Campaign

For a quick tutorial on how to build an advanced campaign, watch the following video.

Build Advanced Campaign

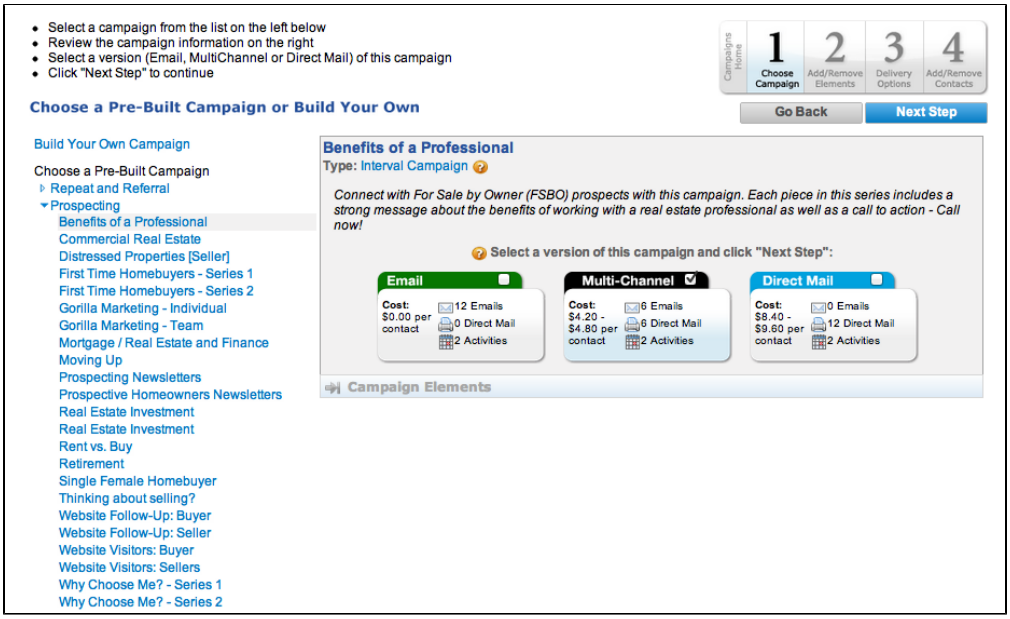
To set up an **Advanced Campaign,** click on the **Advanced** button. You are able to **Choose a Pre-Built Campaign** or a **Build Your Own Campaign.** Let's select **Choose a Pre-Built Campaign.**



Choose a Campaign

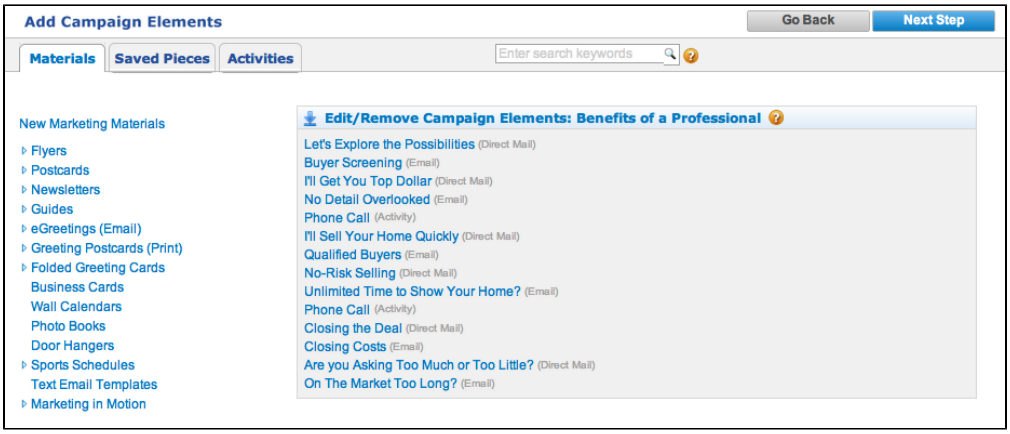
In this example, we select *Contacting :: Rent vs. Buy.* Under the type of campaign, each campaign informs you of the target audience. As you can see in the below example, this campaign is targeted to First Time Home Buyers.

Next, select the version of the Campaign you'd like to start. (i.e. Email, MultiChannel or Direct Mail). In this example, we selected MultiChannel.

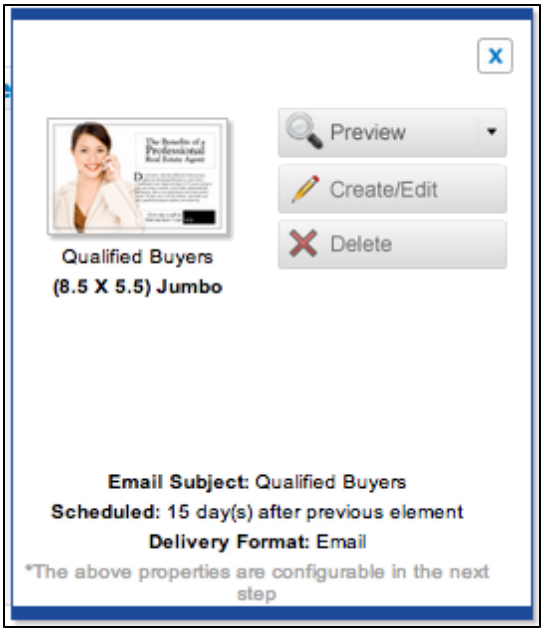


Add/Remove Elements

You have the ability to Edit/Remove any campaign elements to the Rent vs. Buy Pre-Built Campaign. All the pieces scheduled to go out in this campaign are in the box (as shown below). The first piece "Tax Benefits" is a Direct Mail piece (*as noted next to the title of the piece*).



If you'd like to edit, preview or remove this piece from the campaign, click on the name of the piece OR click on the arrow to the left of the name. The below box will display. If you'd like to edit this piece, click on **Edit Piece** and the EZ Editor will display allowing you to edit and save this piece. To preview this piece, click on **Preview Piece.** The first preview that populates is the Email preview. Since this piece is a Direct Mail piece, we'll want to preview the **Print Preview** by clicking on Print Preview button. To Remove the Tax Benefits piece from this campaign, simply click on the **Remove** button. When you are satisfied with your campaign elements, click on **Next Step.**



Delivery Options

In this step, you are able to change the following:

- Campaign Name
- Campaign Type
- Order in which the pieces are delivered
- Delivery Options (i.e. MultiChannel, Direct only, Email only)
- **Date in which pieces are scheduled to go out**
- Delete elements
- Edit the Subject line to Email pieces / Activities
  When you're satisfied with the delivery options, click **Next Step.**

Add/Remove Contacts

Follow the same steps for Add/Remove Contacts as Basic Campaign (*described in the Basic Campaign above*).

To finish, **SAVE** your Campaign by clicking the **Save Campaign** button.

Build Your Own Campaign

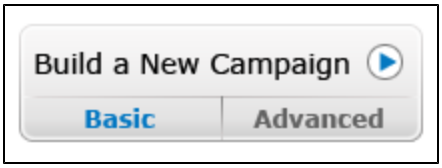
Build Your Own Campaign

For a quick tutorial on how to build your own campaign, watch the following video.

Build Your Own Campaign

Choose Campaign

To set up a **Build Your Own Campaign,** click the advanced button. As you will notice, this campaign is completely blank. It's ready for you to click **Next Step** and start adding marketing materials and activities to it!



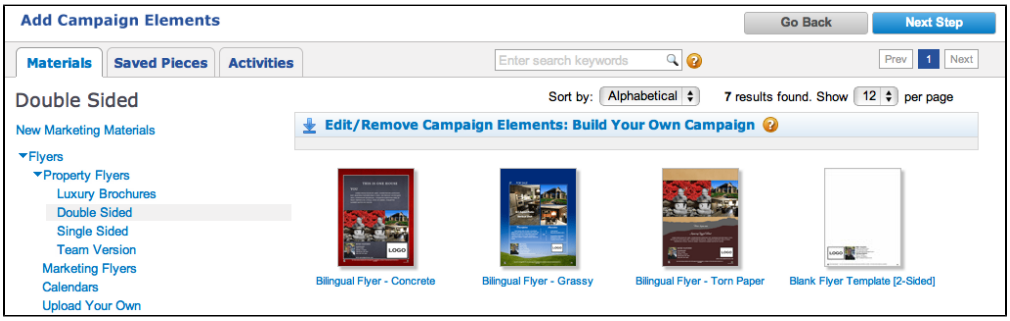
Add/Remove Elements

Add desired marketing pieces by clicking on their name and click **Add to Campaign.** You are able to add Activities by clicking on the Activities tab, then click on the type of activity you'd like to schedule and complete required information.

NOTE: Marketing pieces must be prebuilt or created & saved ahead of time; otherwise if you click on the piece, the EZ Editor will open for you to create/edit & save the piece.

NOTE: To view all of your saved marketing materials, click on **Saved Pieces.**

In this example, we used *Pre-Built Newsletters :: Home Insurance.* There's no limit to the number of pieces / activities you can add to a campaign. When finished adding desired pieces & Activities, click **Next Step.**



Delivery Options

In this step, you are able to edit the following:

- Campaign Name
- Campaign Type
- Order in which the pieces are delivered
- Delivery Options (i.e. MultiChannel, Direct only, Email only)
- Date in which pieces are scheduled to go out
- Ability to Delete elements
- Edit the Subject line to Email pieces / Activities
  When you're satisfied with the delivery options, click **Next Step.**
  Step FOUR: Add/Remove Contacts. Follow the same steps for Add/Remove Contacts as Basic Campaign. To finish, **SAVE** your Campaign by clicking this should be Save and Activate if there are contacts added.

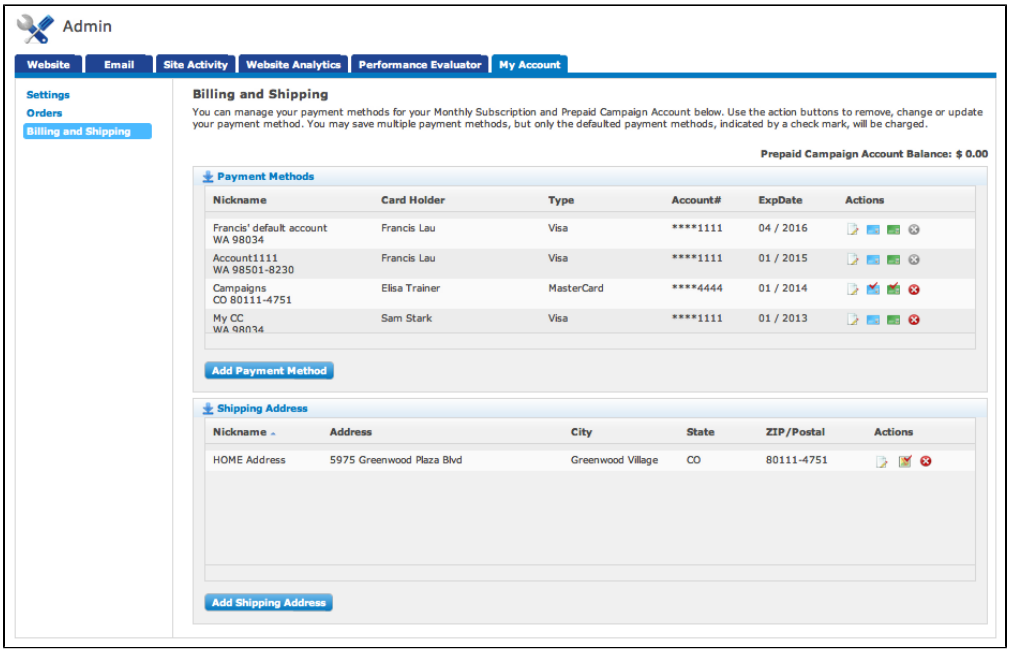
View Transactions and Manage Prepaid Accounts

View Transactions and Manage Prepaid Accounts

From a Campaigns view, you can access transaction information and manage prepaid accounts. A Campaigns view provides the following buttons.

To view, print, or email a receipt for any transactions, click **View Transactions.**
To manage a prepaid account, click **Manage Prepaid Account.** A prepaid campaign account begins with a $25.00 balance, which the billing system charges to your primary **Payment Method** the first time you order a print piece. The billing system deducts from your account each time you order a print piece. When you deplete a prepaid account balance, the billing system replenishes it by charging another $25.00. This continues for the life of a campaign. You can create multiple payment methods and update credit card information. You can view the balance of your account at any time.

For more information on setting a Primary payment method, see Billing and Shipping.



Edit Existing Campaigns

Edit Existing Campaigns

When you click on the name of a campaign in "My Campaigns", you will notice there are different options for you to select from.

Pause

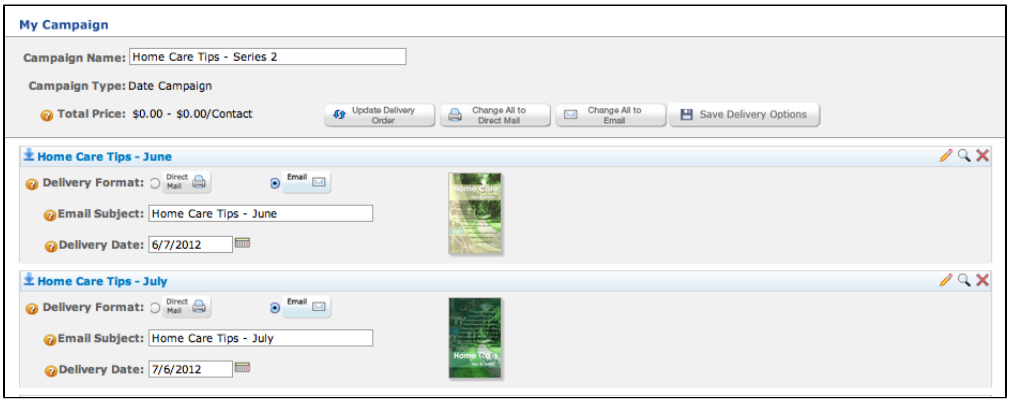
To **PAUSE** an active Campaign, simply click **Pause** in the drop down menu. Once Paused, the Campaign will display as **Paused.** To **UNPAUSE,** simply click **Unpause** from the drop down menu.

Manage Delivery Options

To change delivery options in a campaign, simply click **Manage Delivery Options.** Here you are able to change the *Delivery Format* (Whether you want your contact to receive a marketing piece via direct mail or email), and view the *Price* (the cost to print and mail this piece per contact and change the *Schedule* (This is the number of days after a contact is added that this element is scheduled for delivery or the date the element is scheduled for delivery). Emails are sent out on the exact day and print pieces are targeted to be delivered as close to the exact day as possible. You are also able to change the Subject for scheduled Emails and Activities by typing desired text in the space provided. If you'd like to Change All pieces to Direct Mail OR Change all pieces to Email, click on the corresponding button at the top.

You can change the order in which the pieces go out by typing in the desired number to the left of the title of the piece. When you're done typing in the number, click **Update Delivery Order** for it to appear correctly on your screen. You can also change the delivery order by simply clicking

the UP or DOWN arrow until your piece is in its desired location.



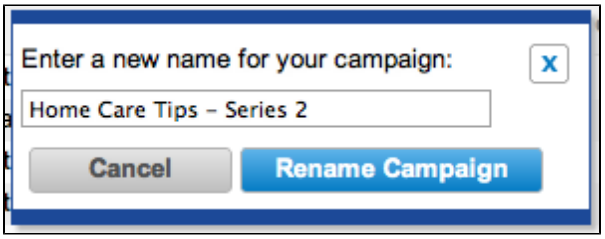
When finished making changes, click the **Save Delivery Options** button.

Add/Remove Contacts

To Add or Remove Contacts from a Campaign, simply click on the **Add/Remove Contacts** button. This will populate the contact manager and you can make desired changes.

Rename

To **RENAME** a Campaign, simply click on the name of the Campaign, select **Rename Campaign,** type the desired name in the space provided and click **Rename Campaign.**



Duplicate

To **DUPLICATE** a Campaign, simply click on **Duplicate Campaign.**
NOTE: Don't forget to add contacts to activate campaign.

Delete

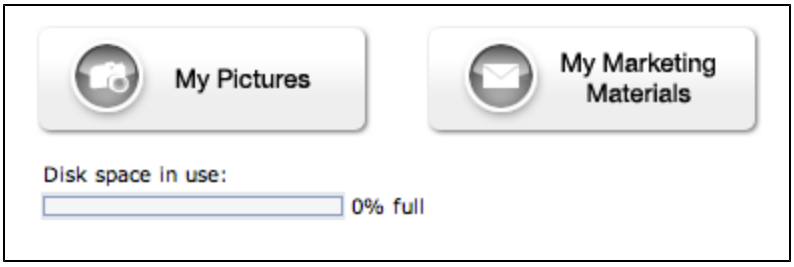
To **DELETE** a Campaign, simply click on the Campaign name and select **Delete Campaign.** A prompt will appear asking if you are sure you want to delete this campaign. Click **OK.**

File Manager

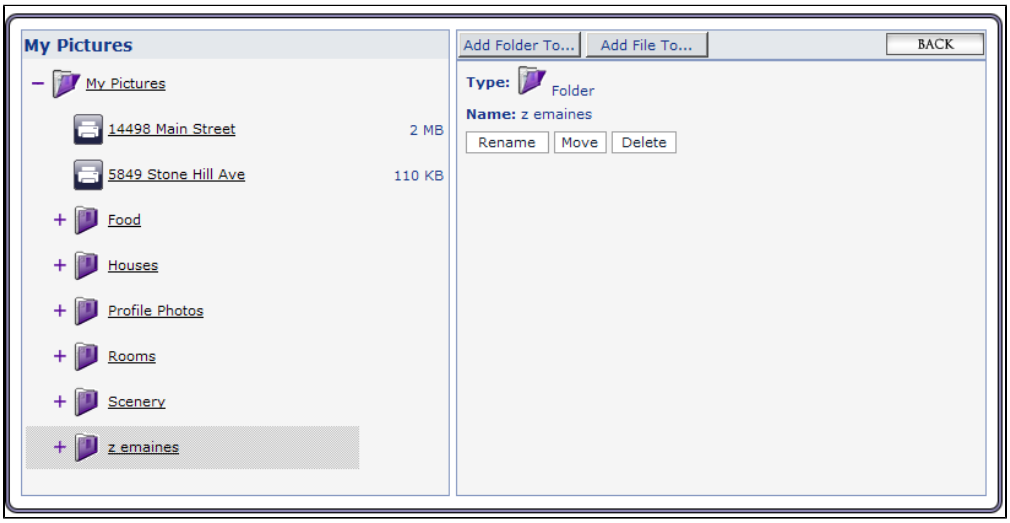
File Manager

File Manager enables you to manage Marketing Materials and Pictures from a file system perspective. With File Manager, you can create folder hierarchies to organize marketing materials, and you can upload and organize graphic files to include in marketing pieces.

> ⚠ File Manager does not support uploading marketing material. With marketing materials, you can only organize, rename, move, and delete.

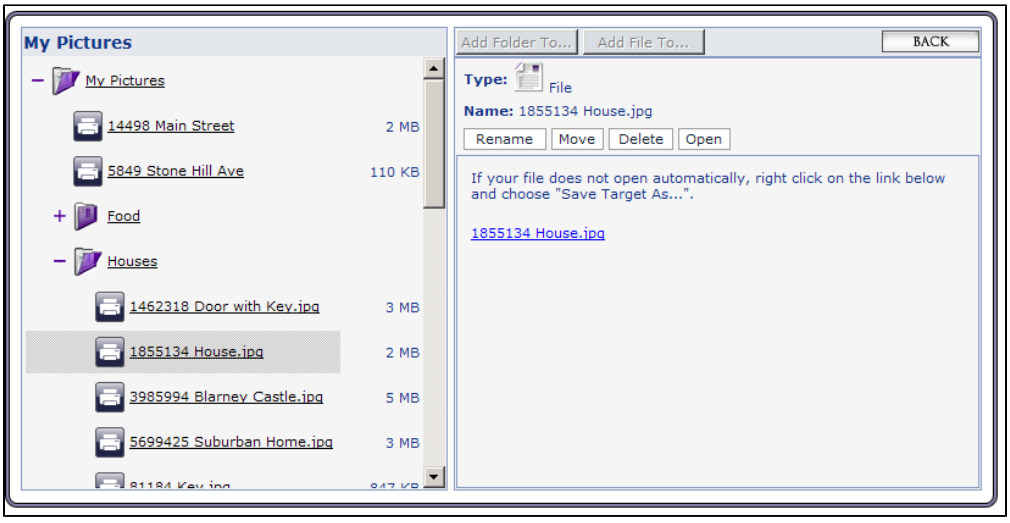


For example, by clicking on **"My Pictures"** you can open all pictures you've uploaded, add new pictures, rename current pictures, put current pictures into folders and delete those you no longer need.



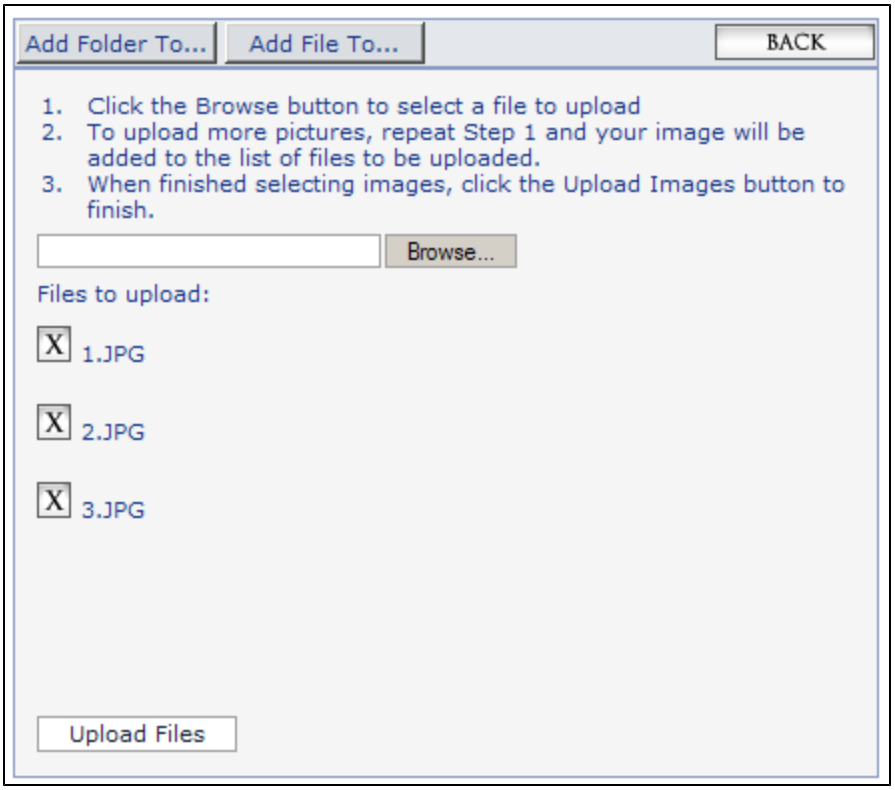
Open

To **Open Current Pictures** in your File Manager, simply click on the name of the photo you'd like to open and select "Open".



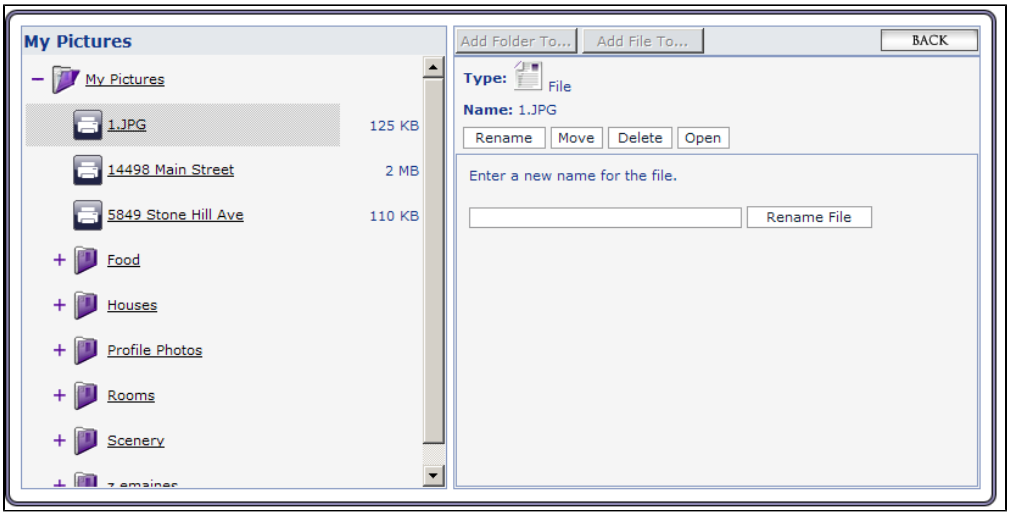
Add

To **Add Pictures** to your File Manager, simply select on the folder in which you'd like to add the photos to by clicking on it, and click "Add File To". Next, click "Browse", select the image you'd like to add by clicking on it and select "Open". This photo is now added to your Files to upload list. Once you've selected all the photos you'd like to add to your File Manager, click "Upload Files". ***NOTE:*** We recommend that you select 5 or less photos to upload at once.



Rename

To **Rename Pictures** in your File Manager, simply select the photo you'd like to rename and click "Rename". Next, type the new file name in the space provided and click, "Rename File".



Delete

To **Delete Pictures** in your File Manager, simply select the photo you'd like to rename and click "Delete".

NOTE: "My Documents" and "My Mailing Lists" work similarly to My Pictures.

System Requirements - Marketing

System Requirements - Create Marketing

The Create Marketing functionality requires the following applications and system settings.

- Change Browser Settings to allow Pop-Ups

- Install Adobe Flash Player
- Install Adobe Reader or Adobe Acrobat
- Install Microsoft Silverlight
- Minimum Screen Resolution

Change Browser Settings to allow Pop-Ups

Change Browser Settings to allow Pop-Ups

To access your account, you must allow pop-up windows from your Market Leader domain.

If you use a pop-up blocker or your Internet Browser is pre-configured to restrict pop-up windows, refer to the browser instructions on how to allow pop-ups for a site. You should only have to do this one time.

Install Adobe Flash Player

Install Adobe Flash Player

You must have Adobe Flash Player 8 or higher to create or preview **Marketing in Motion** marketing pieces.

Check your computer to see if you already have the correct version of Flash Player installed.

1. In a browser, visit the following URL.

   http://www.adobe.com/software/flash/about/

2. On the **Adobe - Flash Player** page, look for a **Version Information** box.
3. Verify that you have the correct or later version.

If you do not have Adobe Flash Player installed on your computer or need to upgrade to the latest version, look for a download link on the previously mentioned Adobe Flash Player page.

Follow Adobe instructions to download and install Flash Player.

Install Adobe Reader or Adobe Acrobat

Install Adobe Reader / Adobe Acrobat

You must have Adobe Acrobat Reader version 9.0 or later installed on your computer to view the print version of marketing materials.

Check your computer to see if you already have the correct version of Adobe Reader installed.

1. If you have Adobe Reader installed, start the application and skip the next step.
2. If you do not have Adobe Reader installed on your computer or need to upgrade to the latest version, visit the following URL.

   http://www.adobe.com/downloads/

   To download and install the application, follow the instructions on the Adobe website. If you are downloading and installing for the first time, you can skip the rest of these steps.

3. In the Adobe Reader application, look for a menu command **About Adobe Reader** or similar on the Adobe Reader menu (Mac) or on the Help menu (Windows).
4. The application displays information about itself including a version number.
5. Verify that it meets or exceeds version 9.0.

Install Microsoft Silverlight

Install Microsoft Silverlight

You must have Microsoft Silverlight 4 or later installed on your computer. If you do not you will be prompted to install it to create or edit Marketing Materials.

Check your computer to see if you already have the correct version of Microsoft Silverlight installed.

1. Visit the following URL in a browser.

   http://www.microsoft.com/getsilverlight/

   When the page finishes loading, it displays a status message for the installed version.
2. Verify that you have the correct version.
3. If you do not have Silverlight installed, follow the instructions on the Get Silverlight page to download and install the application.

For help downloading and installing Silverlight, refer to instructions on the Microsoft website.

Minimum Screen Resolution

Minimum Screen Resolution

The system is designed to work with a screen resolution of at least 1024 x 768. You may be unable to see some controls and options with a lower screen resolution.

Check your computer to view your current screen resolution.

1. For how to adjust screen resolution, consult the help system for your computer operating system.
2. Verify that your screen resolution meets or exceeds 1024 x 768. 1024 represents horizontal resolution. 768 represents vertical resolution. Larger numbers are OK. Smaller numbers are not OK.
3. For optimal viewing, your browser view settings should be set to 100% and your text size should be set to medium.

If you have any questions, or cannot determine if you have the correct programs and settings, call Customer Service toll-free: (866) 614-9372.

Cell Phone Access to Market Leader

Cell Phone Access to Market Leader

You don't have to be in front of a computer to access your Market Leader account. Logging into Market Leader on your smartphone gives you access to the mobile Dashboard which includes the following entities.

- New Email
- Reminders
- Contacts
- Search – Contact by First and/or Last Name

The mobile version renders New Email, Reminders, and Contact lists, where each item in a given list links to a detailed view of the item.

You can access Market Leader on any smartphone, but for the best results, Market Leader recommends using Windows Mobile or iPhone platforms, although with new generations of smart phones, the choice of platform might not be an issue (e.g. it looks pretty sweet on my Nexus S).

Access Market Leader from smart phone

For smart phone access, use the following procedure.

1. On the phone, open a web browser.
2. In the browser address bar, type in your website and add "/m/" to the end of the URL.

   ```
   http://www.servingmainstreetusa.com/m/
   ```

3. In the login form, enter your Market Leader **Login** and **Pass**.
4. Click **Login**.

Instructions for Mobile Email

- Android
- iPhone
- Outlook 2007

Mobile Email

Mobile Email

Market Leader uses the industry standard IMAP protocol. You can use any application on any device that supports the IMAP protocol. For your convenience, Market Leader provides instructions for the following third-party systems.

- Android
- iPhone
- Outlook 2007

These topics contain the Market Leader -specific settings that you need to know, but the methods described are based on limited experience with a limited sampling of system versions. For the most authoritative and up-to-date instructions on how to configure a third-party system, contact the

system provider support.

Android

Android

This step-by-step guide describes how to set up an Android-based phone to automatically receive Webmail. Webmail on your Android device helps you stay connected to contacts and handle business on-the-go.

Summary

- Use IMAP (POP3 is currently not supported).
- When set up, this forwards Webmail Inbox emails to an Android phone.
- To view emails from contacts, touch the **Shown in CRM** folder.

If you respond to contacts from a phone, you must login to the Market Leader **Admin** interface on your desktop to file the messages. For Business Suite users, filing a message shows a broker you handled the email.

⚠ This help topic covers third-party software. Market Leader cannot guarantee its accuracy for your specific device. Each Android device is different, and each device provider adds their own customization to the basic Android OS and applications. Your best source for device-specific information is your device provider. When you contact your provider, make sure you have the following Market Leader connection-specific values handy.

Set Up Android IMAP Account

1. On an Android device, touch the All Apps ( ) icon.
2. Swipe the screen to find the **Email** application.
3. Touch **Email**.

   The goal of the next step is to access email settings or an accounts list.
4. If your device includes a permanent menu key, touch it.

   On some devices, a small stack-of-horizontal-lines icon represents the menu key. Depending on your device, the menu options might include **Settings** or **Accounts**. If you do not have a menu key, try to touch, or touch-and-hold, on other Email screen icons.
5. Depending on your device, touch **Settings** or **Accounts**.
6. Touch **Add account**.
   - Email address: Type your Market Leader email address (yourprefix@yourwebsiteURL.com)
   - Password: Type your Market Leader password.
   - Send email from this account by default:
     - Check this box if you want this to be your primary email account on the phone.
     - Uncheck if you do not.
7. Touch **Next**.
8. Choose IMAP as "Type of account"
9. For Incoming server settings, use the following.
   - Username: Verify that this contains your full email address (yourprefix@yourwebsiteURL.com).

     ⚠ It might show your prefix only, so you must verify that it contains your full email address.
   - Password: Leave as is. This defaults to the same as what you previously entered.
   - IMAP server: **mail.yourwebsiteURL.com**.
   - Port: Leave default at **143**.
   - Security type: Leave as **None**.
   - IMAP path prefix: Leave blank or optional (default).
10. Touch **Next**.

    The phone attempts to connect for incoming messages.
11. For Outgoing server settings, use the following settings.
    - SMTP server: **smtp.yourwebsiteURL.com**.
    - Port: Change port to **587**.
    - Security type: Leave default as **None**.
    - Require sign-in: Leave default (check).
    - Username: Confirm this is correct.
    - Password: Confirm this is correct.
    - Touch **Next**.
12. Review notification settings and adjust them according to your preferences.
13. Touch **Next**.
14. Give the account a name (suggestion: Market Leader).
15. Enter your name for display on outgoing messages.
16. Touch **Next**.

If all goes well, you have successfully set up your Market Leader Webmail to be accessible from your phone. If these instructions do not work for you, please contact your phone provider for support in setting up email accounts. With the settings specified in this topic, your provider can help

you with specific guidance for your device.

To View Contact Email

1. On an Android device, touch the All Apps ( ) icon.
2. Swipe the screen to find the **Email** application.
3. Touch **Email**.
4. Touch the **Folder** icon near the bottom of the screen.

   Depending on your device, you might access folders from a menu. If so, open the Email menu and select **Folders**.
5. In the **Folders** list, select **INBOX.ShownInCRM**.

You do not receive notifications for email received in the INBOX.ShownInCRM folder, but you can respond to messages from a phone, and the replies are saved in your Market Leader account. To file messages, you must log into Market Leader on a desktop computer.

Troubleshooting

What if I don't see my Market Leader email?

1. From a **Home** or **All Apps** screen, touch **Email**.
2. Touch the account name at the top of the screen.
3. From the drop-down menu, select your Market Leader account name, or **Combined** to see a single view of all your email accounts.

   Depending on your device, you might have to access an **Accounts** list using a menu key or some other method.

As previously stated, for further assistance troubleshooting your Android device or applications, please contact your device provider.

iPhone

iPhone

This step-by-step guide will show you how to set up your iPhone to automatically receive your Market Leader Webmail emails. This will help you stay connected to your contacts and handle your business "on-the-go."

Summary:

Use IMAP (POP3 is currently not supported)

To view emails from your contacts, you will need to click the "Shown in CRM" folder

If you respond to your contacts from your iPhone, you will still need to login to Market Leader to "File" your emails from contacts (Business Suite users: this is how your broker knows you handled the email.)

Instructions:

1. Begin by clicking "Settings" from your home screen.

2. Select "Mail, Contacts, Calendars."

3. Select "Add Account."

4. Select "Other."

5. Select "Add Mail Account".

6. Enter your Name, Address, Password and Description. Click "Save":

Address: This is your Market Leader account email address (yourprefix@yourwebsiteURL.com)

Password: This is your Market Leader account password

Description: This will be the label for your Webmail folder on your phone

7. Enter Host Name, User Name and Password for the Incoming and Outgoing Mail Server. Click "Save."

Incoming Mail Server

Host Name: mail.yourwebsiteURL.com

User Name: This is your Market Leader email address (yourprefix@yourwebsiteURL.com)

Password: This is your Market Leader account password

Outgoing Mail Server:

Host Name: smtp.yourwebsiteURL.com

User Name: This is your Market Leader email address (yourprefix@yourwebsiteURL.com))

Password: This is your Market Leader account password

8. Click "Yes."

9. Now you can see your Market Leader Webmail inbox. Check emails from contacts by clicking the "My Email" button.

Note: this button will be labeled differently depending on what you entered as the "Description" in Step 6.

10. Click the folder "Shown in CRM" to view your contact email.

11. After successfully testing the account settings, click "Close." Congratulations! You can now start using your iPhone to send email from your account.

***Remember to login to your Market Leader system to "file" your emails to indicate you have responded to them.

Error Messages:

If you get the following error when you complete your setup, click "Continue."

Wait for about 1 minute. If it works, you will see the image below. Click your button to go to your home page:

From your homepage, click on your email icon.

In your Accounts screen, click the name of your new email account

You can now access your Webmail inbox or Contact email (in the "ShownInCRM" folder).

Outlook 2007

Outlook 2007

This step-by-step guide will show you how to set up your Outlook 2007 to automatically download your Market Leader Webmail emails in your Outlook inbox. This will help you stay connected to your contacts.

Summary:

Use IMAP (POP3 is currently not supported)

Once set up, this will forward all Webmail inbox emails to your Outlook inbox

To view emails from your contacts, you will need to click the "Shown in CRM" folder

If you respond to your contacts from Outlook, you will still need to login to Market Leader

to "File" your emails from contacts (this is how your broker knows you handled the email.)

What if I don't use Outlook 2007?

For all other Outlook versions and mail clients, your instructions are slightly different from the Outlook 2007 instructions below. The general process is the same, so we encourage you to go ahead and do it yourself. While doing so, please use the server details below to complete your webmail forwarding setup.

Username: yourprefix@*websiteURL*.com (example: esmith@servingmytown.com)

Password: This is the same password that you use to login to Market Leader

Incoming mail server: mail.*websiteURL*.com

Outgoing mail server: smtp.*websiteURL*.com

Incoming Port: (default): 143

Outgoing Port: 587

Instructions to set up your Outlook 2007

1. Open the Tools menu in Outlook, and select 'Account Settings.'

2. Under the email tab, select 'New.'

3. In the screen that appears, select the first option, POP3, IMAP, or HTTP and click Next.

4. On the next screen, select the checkbox at the bottom, which will grey out all the text fields. Select Next.

5. On the next screen, select 'Internet Email' and click Next.

6. On the next screen, complete all the fields.

Enter your User Information and Login Information as shown in the sample below. It's important to complete all fields.

Note: Your username is your entire Market Leader email address, and your password is the same as you use to log into your website.

Enter the Server Information. Select IMAP under Account Type.

NOTE: Your server information will vary, depending on what your website address is. For example, if your website URL is searchinantarctica.com then your incoming mail server is mail.searchinantarctica.com. In the example provided, the website is blackwaterny.com, and you can see the appropriate mail servers in use for that website.

Incoming Mail Server: mail.*yourwebsiteURL*.com

Outgoing Mail Server: smtp.*yourwebsiteURL*.com

7. After you have filled out the entire form, click on 'More Settings.

8. In the More Settings window, first select the 'Outgoing Server' tab. (image 1)

Check the box that says the outgoing server requires authentication.

Select "Log on using", and enter in your login credentials.

9. Click on the 'Advanced' tab, and change the outgoing server port number to 587, and click 'OK.' (image 2)

10. On the next screen, click the 'Test Account Settings...' button, and a small window will appear.

At this time, the system is testing the connection for you. Once it's finished, it should tell you the testing results were successful. If these tests fail, you did not supply correct information at some point. Go back and check your user name, password, and other items for typos.

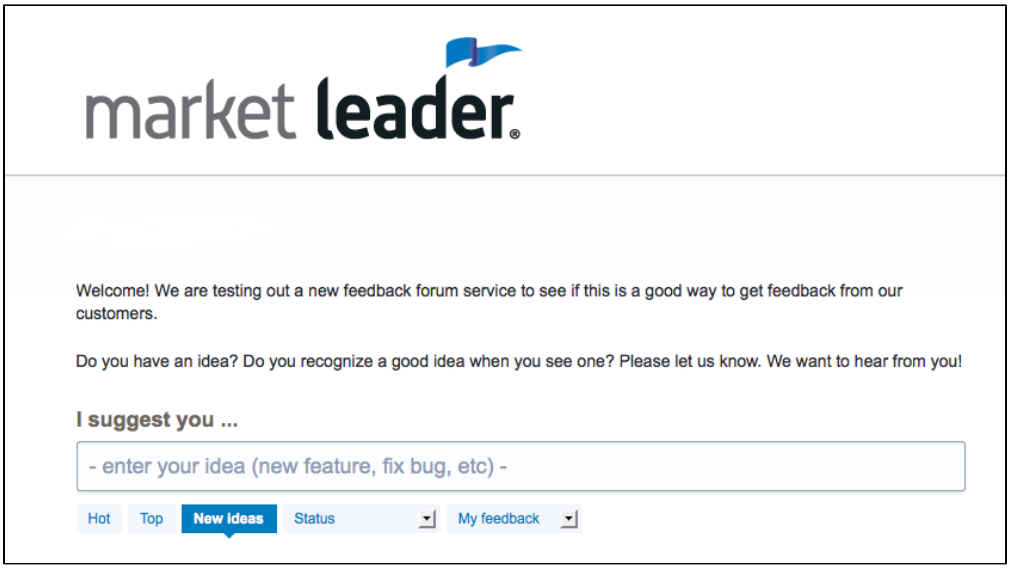
11. After successfully testing the account settings, click Close.

The wizard is finished and you can start using Outlook to send email from your account.

Give us your feedback

Give us your feedback

Market Leader subscribes to a third party forum service that provides you with the ability to give us your feedback. You can view other user suggestions, vote on suggested ideas, and offer your own. To visit this forum, from the Admin interface, hover on **Help** and click **Give us your feedback**.



Reporting

Reporting

The Reporting section covers the Market Leader **Admin** panel tools that help you analyze the consumer website activity and assess your performance against industry standards. It includes the following topics.

- Site Activity
- Website Analytics
- Performance Evaluator

For Business Suite & Professional

For Business Suite & Professional

This section describes Market Leader product functionality available to the following users.

- Professional site owner
- Business Suite site owner

Best Practices - Broker

Best Practices - Broker

This section covers best practices for brokers and team leaders. In this section, we assume you are already familiar with the information in the Using Market Leader Essentials section. There is a great deal of information there that applies to all users of the system, not just agents, such as importing and exporting, featured business partner, and configuring listing search fields that is not repeated in this section. In the interest of brevity, we use the term broker to refer to both brokers and team leaders and the term brokerage to refer to brokerages and teams.

For broker best practices on the Market Leader system, please refer to the following tips.

- Add Agents
- Pluralizing Team Emails
- Craigslist Strategy
- Participate in the Referral Network
- Set Agent Expectations
- Monitor Agents
- First Call Follow-up

See Also

- Agents View Description
- Performance Evaluator - Agent
- Add an Agent
- Delete Agent
- Post on Craigslist
- Reporting

Add Agents

Add Agents

As soon as possible after Market Leader activates your account, you need to add agents to the system. When you first get your login and password information, log into the Market Leader **Admin** interface
and add agents right away. Some Market Leader advertising goes live the instant your site is up, so you do not want your agents to miss any valuable contacts. If you do not have any agents set up in the system, incoming contacts will be assigned to you.

Pluralizing Team Emails

Pluralizing Team Emails

When using the Market Leader system as a team, you need to pluralize team emails. For agent partners who work together, enter both agents' names into the **Name** field (for example "John & Susie Smith"), and then select the Team check box. For more information, see Add an Agent. When this check box is selected, the system will change outgoing, system generated, messages to use plural forms of personal pronouns, such as we instead of I.

Craigslist Strategy

Craigslist Strategy

A good Craigslist strategy can greatly benefit your brokerage. Craigslist is a great source of visitors, and you can substantially add to the number of contacts you get each month by posting your listings on Craigslist. Encourage all of your agents to post listings regularly to Craigslist, or assign a member of your office staff the task of posting listings to Craigslist. Posting 5 listings in the morning and 5 in the afternoon will only take about 15 minutes each day, and the impact can be substantial.

In order for agents to post listings to Craigslist, their profile in the Market Leader system must contain an Agent MLS ID.

Participate in the Referral Network

Participate in the Referral Network.

By participating in the referral network, you can receive referrals from other brokers in the Market Leader system. Referrals are contacts that are working with an agent in the Market Leader network to buy a home but are selling a home outside of that agent's area. You can easily accept referrals and assign an agent to start working with the contact to sell the home.

Set Agent Expectations

Set Agent Expectations

When you start using the system and anytime you add an agent to the system, set expectations with the agent. Be clear about the tasks that an agent must do and how often they must do them. At a minimum, agents should log in every day to check for messages and new contacts. Agents should respond to email messages and new contacts within 12 hours. You can check agent performance using the performance evaluator or see their activity under the agents tab.

See Also

- Initial Contact Wizard (ICW)

Monitor Agents

Monitor Agents

Take a few minutes each day to monitor agent activity. Make sure your agents are following up with contacts in a timely manner. Market Leader provides a number of ways to monitor the agents in your brokerage. If an agent is not following up with contacts, you can follow up on behalf of the agent, reassign contacts to another agent, or even lock the agent out of the system. To learn more about the statistics that the system tracks, see the Performance Evaluator section.

First Call Follow-up

First Call Follow-up

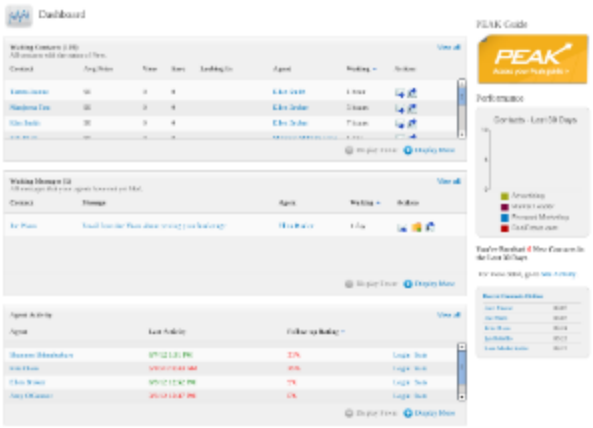
Make sure agents follow up with contacts that have a new comment icon ( ), from the First Call center, next to their name. If you are using Call Center, make sure that agents follow up quickly with all contacts that the Market Leader call center staff indicate want immediate follow-up.

These contacts are marked by a call center immediate callback icon ( ). Because these contacts want to be contacted immediately, they are more likely to purchase or sell a home in the near future, which is good for the agent and the brokerage.

Broker Dashboard

Broker Dashboard

The broker **Dashboard** gathers key information about yourMarket Leader system activity, so you can quickly identify **Waiting Contacts**, **Waiting Messages**, **Agent Activity**, and more. When you log into the Market Leader **Admin** interface, the Dashboard displays an overview of activity for your brokerage. You can use it as an entry point to many parts of the site. The following graphic shows the broker Dashboard view (click to enlarge).



You can click on highlighted text in lists to access more information about the item. You can click on icons in the lists to perform a given action. By hovering your mouse pointer over the icon, you can get a hint for the action.

Waiting Contacts

See all contacts with a status of New. If the list is long, make sure that your agents are quickly following up with contacts and changing the status.

Waiting Messages

See all the messages that have not been filed. Contacts are waiting for answers to some messages, but some just need to be filed. Make sure your agents are filing messages after they respond.

Agent Activity

See when your agents last logged in to the system

Contacts-Last 30 Days

Quickly view a chart of the number of contacts, grouped by source, who have registered on your website in the last 30 days.

New Contacts

Quickly check a textual display of the total number of new contacts your brokerage has received in the last 30 days.

Recent Contacts Online

See a list of the contacts that have most recently visited your website. For a full list of contacts who have visited your site in the last 48 hours, click the list heading, **Recent Contacts Online**.

See Also

- Waiting Messages
- Agent Profile
- Performance Evaluator - Agent
- Agents View Description
- Status
- Recent Activity

Waiting Messages

Waiting Messages

The Waiting Messages view shows all messages, to agents in your brokerage, that have not been filed. To keep this list manageable, encourage agents to file all messages when they respond, so the list only shows messages that require a response. The Waiting Messages list is functionally equivalent to viewing all of your agents My Inbox Messages lists with the **Not Filed** filter selected. The Waiting Messages list has the same information as the Messages list but replaces the Date column with **Waiting** column which shows how long a message has been in the queue and adds a column to show the **Agent** to whom a message was sent.

To verify whether a message has been replied to, you can view all messages to and from a contact in the Contact Email pane of the Contact Summary view.

For more information on functionality of the Waiting Messages list, see Messages.

If Agents Are Unable to Respond to Messages

If you know that an agent is temporarily unable to respond to messages, you can respond on the agent's behalf. The From address and signature on the message belong to the agent, so consider that when drafting a response. If an agent is not be available for an extended time or has left the brokerage, you can assign a different agent to the contact.

See Also

- Broker Dashboard
- Performance Evaluator - Agent
- Agents View Description
- Best Practices - Agent
- Agent Dashboard

Call Center

Call Center

First Call is a call center service provided by Market Leader , where Market Leader calls all new contacts, that provide a phone number, within 20 minutes of the contact signing up. The call center asks the contact a series of questions and enters comments for the agent about the contact. If your brokerage uses First Call, there is a Call Center tab in the Team Tools view. The Call Center view shows the 20 most recent comments created by call center staff. All comments made by call center staff are saved in the Comments section of the Contact Summary.

Contacts with a First Call immediate callback icon ( ) next to their names have requested an agent follow up with them immediately.

Call Center Actions

From the Call Center view, you can send email to a contact or transfer a contact to a different agent. To perform the following actions, make sure you are logged into the Market Leader **Admin**interface.

1. To respond to a contact, click Email Contact ( ).
2. To assign a contact to a different agent, click Transfer Contact ( ).

Agents should call or email contacts with stars ( ) as soon as possible.

Changing an Agent First Call Preference

You can choose which agents participate in the First Call rotation. To change an agent First Call preference, you edit the agent profile. For more information on editing an agent profile, see My Account.

Agents

Agents

Market Leader gives site owners (brokers and team leaders) tools to manage agents. The Agents view presents a summary of information about all agents on the system. Agent profiles contain all information relevant to an agent. In the agent profile view, you can edit agent information. In the performance evaluator view, you can see how agent statistics compare with national performance data. The following sections provide information about these and other features.

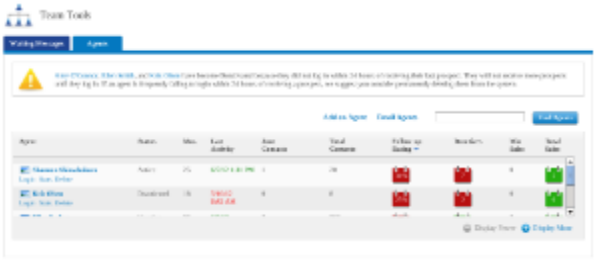
See Also

- Agent Profile
- Add an Agent
- Edit Agent Profile
- Delete Agent
- Email Agents
- Agents View Description
- Performance Evaluator - Agent
- Automatic Performance Notification

Agent Profile

Agent Profile

You can access an agent profile by clicking an agent name in the Agents view. The Agents view lists all agents and enables you to search for an agent, add a new agent, or send an email to an agent. The following graphics show the Agents and Agent Profile views. To enlarge an image, click a thumbnail.



When you click an agent name in the Agents view list, the system displays a profile view for the agent. For more information on the profile view, see My Account.

See Also

- Add an Agent
- Edit Agent Profile
- Delete Agent
- Call Center

Add an Agent

Add an Agent

You can add an agent from the Agents view. To add an agent use the following procedure.

1. Make sure you are logged into the Market Leader **Admin** interface.
2. In the navigation list, click **Agents**.
3. In the **Agents** view, click **Add an Agent**.
4. In the **Add an Agent** view, enter the agent data in all required fields.

   Required fields include an asterisk next to their label.

5. If the profile represents a team, enter both names in the **Name** text box and select the **Team** check box.

   For team profiles, the system changes the voice of automatic email messages to plural, for example by using "we" instead of "I."

6. For **Existing Email**, enter an email address that is not part of the Market Leader system.
7. If you do not want an agent to receive contacts from advertising, clear the **Include in Rotation** check box.
8. If you do not want an agent featured on the **Meet Page**, clear the **Meet Page** check box.

   If there are more than 20 agents flagged to appear on the meet page, the **Meet Page** format changes to a condensed view, where the customer clicks on an agent name to view a profile.

9. If you want to disable login to a Market Leader account, clear the **Account Access** check box.
10. If you want to exclude an agent from the **First Call** rotation, clear the **First Call** check box.
11. Click **Save**.

    Once you have clicked Save, the system sends a welcome email with login credentials, so the agent can log into the system.

Include a picture for every agent. When contacts see a photo, they are more likely to make contact. Each photo should be a JPEG that is 130 pixels tall and 100 pixels wide and must be less than 8 MBs in size.

Resending Login Credentials

If an agent forgets their login credentials, you can resend them. To resend the login credentials, use the following procedure.

1. In the **Agents** view, click an agent name.

   If you do not see the name, use the **Find Agents** search box. You can search on either first or last name. When you click a name, the system opens an agent profile view.

2. In the agent Profile view, click **Resend Welcome Email**.
3. The system sends the welcome email to the External Email address which is not part of the Market Leader system.

See Also

- Edit Agent Profile
- Agents View Description
- Performance Evaluator - Agent
- Referrals

Edit Agent Profile

Edit Agent Profile

You can edit an agent profile for any of the agents that you manage. To edit a profile, use the following procedure. For more information on fields in the edit profile view, see Add an Agent.

To Change Profile Info

1. Make sure you are logged into the Market Leader **Admin** user interface.
2. In the navigation list, click **Agents**.
3. In the agents list, click a name.
4. In the **Profile** view, click **Edit**.

   The view changes to an editable form.

5. On the editable form, make changes, as you wish, to any profile information including current photo.

   The editable form includes a link to add an agent MLS ID. To change office MLS IDs, use the **General Info** tool. To add an agent MLS ID use the following procedure.
   a. Click the **Add Agent MLS ID** link.
   b. On the **Add Agent MLS ID** form, provide appropriate values.
   c. Click the **Save** button.
6. When you are finished making changes to a **Profile**, click **Save**.

See Also

- Agent Profile
- Performance Evaluator - Agent
- Add an Agent
- Delete Agent

Delete Agent

Delete Agent

In the **Agents** view, you can delete an agent. To delete an agent use the following procedure.

Delete an Agent

1. Make sure you are logged into the Market Leader **Admin** interface.
2. In the navigation list, click **Agents**.
3. In the agents list, find an agent name either by scrolling or searching.
4. In the row of the agent to be deleted, click **Delete**.

   The system displays a confirmation box in which you choose one of the following options.
   - Click the **Agent** option to enter the name of another agent to receive all of the contacts from the deleted agent.
   - Click the **Round Robin** option to distribute contacts from the deleted agent among all of the active agents in your office.
5. Click the **Yes** button to finish.

Transferred Contacts

- If a single agent is chosen and they have signed up for alerts, the system sends an alert notifying them of newly transferred leads.

- If the Round Robin option is chosen, the system does not send alerts.
- The system records transfers in the Contact History to maintain a searchable thread of continuity.
- All transferred contacts retain their original status.

See Also

- Add an Agent
- Edit Agent Profile

Email Agents

Email Agents

The system enables you to send an email to all agents on the system. You can filter email recipients by All, Active, or Inactive agents. To send email to agents, use the following procedure.

To email agents

1. Make sure you are logged into the Market Leader **Admin** interface.
2. In the navigation list, click **Agents**.
3. In the **Agents** view, click **Email agents**.
4. In the **Send to** option list, select among **All**, **Active**, or **Inactive** options.

   The select options only include logical options. For example if you have no inactive agents, **Inactive** is not an option.

5. Enter a subject line.
6. Enter the text of the email.
7. Click the **Send** button.

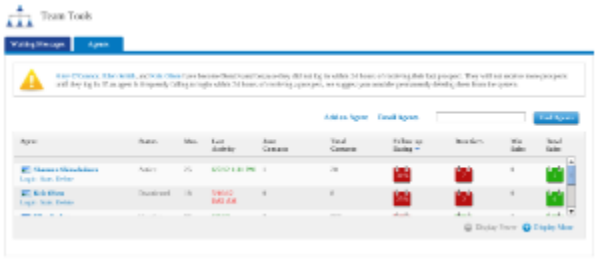
See Also

- Email Only Accounts

Agents View Description

Agents View Description

The Agents view provides a quick view of agent performance. The following graphic shows the Agents view. To enlarge the image, click the thumbnail.



Agents Tab Information

The following table contains descriptions of the fields in the agent list.

Field	Description

Status	The system includes five types of status for agents: active, inactive, deactivated, disabled, and vacation. For an agent to receive new contacts, his or her status must be active. You, as broker or team leader, set active or inactive status when you decide whether to put an agent in rotation for new contacts. The system triggers deactivated status whenever an agent fails to login within 24 hours of receiving a new lead. If this happens the agent does not receive any more leads until they log in again. The system also triggers the disabled status if an agent is deactivated more than 4 times in a 30 day period. This removes the agent from lead rotation permanently, unless you (i.e. broker or team leader) manually adds an agent back into the rotation. An agent sets their status as **Available** or **On Vacation** by selecting an option from a select list in the header bar of Market Leader page. The system sends an agent a notification alert on the 4th deactivation in 30 days. The system sends a broker a notification alert if an agent account becomes disabled.
Mos.	The number of months that the agent has been on the system.
Last Activity	The last time the agent was active on the system.
<Current Month> Contacts	The total number of contacts the agent received this month.
Total Contacts	The total number of contacts currently assigned to the agent.
Follow-up Rating	The percentage of time the agent manually uses the Initial Contact Wizard (ICW) within 12 hours of receiving a lead. For more information, under the agent's name, click **Stats**.
Deactives	The number of times that the system deactivated the agent for failure to log in within 24 hours of receiving a new contact.
Min Sales	The minimum number of sales to maintain expectations.
Total Sales	The total number of sales that an agent has completed.

See Also

- Agent Profile
- Performance Evaluator - Agent
- Add an Agent
- Delete Agent
- Edit Agent Profile

Performance Evaluator - Agent

Performance Evaluator - Agent

Performance Evaluator helps you compare the performance of an agent to national averages. The system pulls statistics and in many cases provides a rating. For more information on each statistic, read the descriptions in the Performance Evaluator view. The following graphic shows a Performance Evaluator view of an agent. To enlarge the image, click the thumbnail.

View Performance Evaluator

To view Performance Evaluator for an agent, use the following procedure.

1. Make sure you are logged into the Market Leader **Admin** interface.
2. In the navigation list, click **Agents**.
3. In the row of a specific agent in the list, click **Stats**.

   The system displays Performance Evaluator. Performance Evaluator has several categories containing a description of the evaluation and criteria.

View Your Performance Evaluator

If you, as team leader or broker, actively help contacts buy and sell homes, you can view your own performance statistics. To view your own statistics, use the following procedure.

1. Make sure you are logged into the Market Leader **Admin** interface.
2. In **Admin** section of the navigation list, click **Performance Evaluator**.

   The system opens Performance Evaluator for the logged in user.

See Also

- Agents View Description
- Best Practices - Broker
- Broker Dashboard

Automatic Performance Notification

Automatic Performance Notification

The Market Leader system automatically tracks agent responsiveness for you. To maximize your success, agents must respond to contacts immediately, therefore Market Leader monitors individual agent performance and sends an email alert if any agent fails to meet best practice standards.

Automatic Actions

The system includes the following automatic actions.

- The system notifies agents if they have been deactivated 4 times in 30 days. The system deactivates an agent every time they fail to respond to a new contact within 24 hours.
- The system notifies brokers (or team leaders) if an agent account becomes disabled. An account becomes disabled if an agent fails to respond to a new contact within 24 hours 5 times in 30 days. In this event, the system removes the agent from leads rotation.

Notes

- The system sends all email alerts to both the Market Leader and non-

  Market Leader email accounts.

- Site owner (broker and team leader) accounts are never disabled.

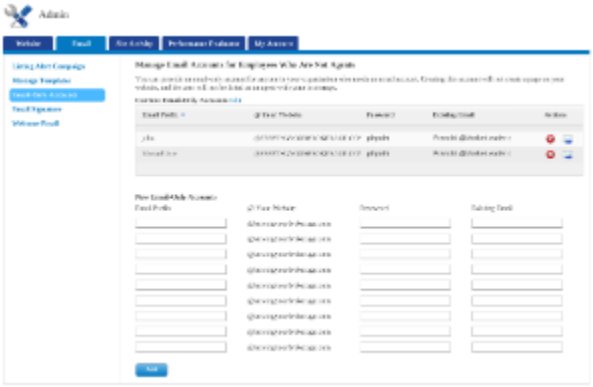
See Also

- Performance Evaluator - Agent
- Broker Dashboard
- Waiting Messages

Email Only Accounts

Email Only Accounts

For office staff who do not perform agent functions, you can create Email-Only accounts. This enables staff to send and receive emails with the domain branding of your business. When you create an Email-Only account, no Market Leader website or CRM is created, and the user is not listed as an agent with your brokerage. The Email-Only view shows a brief description followed by a list of current Email-Only accounts and a form for entering new Email-Only accounts. The following graphic shows the Email-Only accounts view. To enlarge the image, click the thumbnail.



Add, Edit, and Delete Email-Only Accounts

The Email-Only accounts view enables you to add, edit, and delete accounts. You can also resend login credentials (welcome email) to someone who lost theirs. To perform any of these tasks, use the following procedure.

1. Make sure you are logged into the Market Leader **Admin** interface.
2. In the navigation list, click **Email**.
3. In the **Email** view, click **Email-Only Accounts**.

   The system displays the Email-Only Accounts view.
4. To add an Email-Only account,
   a. In the **New Email-Only Accounts** form, enter an email prefix, password, and an existing email address that is not part of the Market Leader system, for each new account.

      The system must send the welcome email with login credentials to an address outside of the system.
   b. Click the **Add** button.
5. To edit Email-Only accounts,
   a. In the **Current Email-Only Accounts** list, click **Edit**.
   b. Enter new information.
   c. Click **Save Changes**.
6. To delete an Email-Only account,
   a. In the **Current Email-Only Accounts** list, click the Delete icon ( ) for an account.
7. To resend login credentials for an Email-Only account,
   a. In the **Current Email-Only Accounts** list, click the **Resend** welcome email icon ( ) for an account.

      The system sends a new welcome email to the **Existing Email** address.

Mortgage Lender

Mortgage Lender

If a mortgage lender is associated with your account, you can track how often the lender logs into the site and the number of contacts agents send to the lender for pre-approval. The Mortgage Lender view includes lender contact information.

The system notifies you if a lender partner has not logged in within 72 hours. If the lender does not log in regularly, you might want to work with a different lender.

View Mortgage Lender Information

1. Make sure you are logged into the Market Leader **Admin** interface.
2. In the navigation list, click **Mortgage Lender**.

This feature is only available in Business Suite.

See Also

- Featured Partners

Referrals

Referrals

The referral network connects you with professional real estate brokerages nationwide. A contact might want to buy a property listed on your website and also indicate that they want to sell a house. If your brokerage serves the zip code for the sale, Market Leader marks the contact as a listing opportunity. If your brokerage does not serve the area of the sale, Market Leader automatically refers the contact to another brokerage within the network that serves the zip code of the sale. The system assigns referrals based on the zip codes you enter in Communities Served of the Website view.

Incoming Referrals

When a contact registers with another brokerage in the referral network, and wants to sell a home in your area, the contact appears on the Incoming Referral list. As soon as possible, review the referral terms. If you agree to the terms, assign an agent and accept the contact.

Manage Incoming Referrals

1. Make sure you are logged into the Market Leader **Admin** interface.
2. In the navigation list, click **Referrals**.
3. To accept a referral,
    a. For a specific referral, click **Accept**.
    b. Review the terms of the referral.
    c. If you agree, check **I agree to the referral terms above**.
    d. In the **Assign To Agent** list, select an agent.

        The **Assign To Agent** list includes all active agents.

    e. Click **Accept Referral**.

        Until you accept the terms, the **Accept Referral** button is inoperable. If you do not agree to the terms, click Cancel.

Outgoing Referrals

When a contact wants to sell a home outside of your area, the system refers the contact to other real estate brokers who serve the area of the sale. If a broker agrees to referral terms and accepts a referral, they agree to pay a referral commission when the sale closes.

View Outgoing Referrals

1. Make sure you are logged into the Market Leader **Admin** interface.
2. In the navigation list, click **Referrals**.
3. Click **Outgoing Referrals**.

For each outgoing referral, the Outgoing Referrals view displays the following information.

- Name
- Agent
- Property information
- Date the contact signed up on the agent's website
- Brokerage the contact was referred to
- Date the brokerage accepted the referral

See Also

- Best Practices - Broker
- Edit Agent Profile

For Lenders

For Lenders

This section describes Business Suite functionality available to lenders.

See Also

- Contacts - Lender
- Contact Status - Lender
- Built-in Status Type - Lender
- Custom Status Type - Lender
- Contacts - Lender
- Share Comments
- Reminders - Lender
- Admin - Lender
- Alerts - Lender
- Welcome Email

Best Practices - Lender

Best Practices - Lender

This section provides tips and pointers to help you get started with Market Leader and improve your success in the market place. It includes the following topics.

- Pre-approval Requests
- Contact New Contacts ASAP
- Welcome Email URL
- Share Lender Comments
- Build Relationships

See Also

- Contacts - Lender
- Summary Comments
- Contact Summary

Build Relationships

Build Relationships

Building a good relationship with the agents on the system is essential for your success. If you have never met some of the agents on the system, set up a lunch meeting with the active ones and introduce yourself. The agents can send you contacts as well, so with the proper relationship in place you can double or even triple the contacts you receive. Before sending you contacts, agents need to know you and trust that you will handle the contact quickly and properly. So with a little face time and the proper use of the system you can leverage the best possible source of contacts on the web.

Contact New Contacts ASAP

Contact New Contacts ASAP

It is important to contact new contacts as soon as possible after they request a pre-approval. If you do not call or email new contacts within the first few hours, they are more likely to forget they requested the pre-approval, or they have moved on to request information from another lender. Set up alerts to be notified when you receive new contacts.

Pre-approval Requests

Pre-approval Requests

For lender accounts in the Market Leader system, every contact has requested a pre-approval. When you contact a contact, inform the contact how you got their contact information, so they don't think it is a cold call. Make sure they know you are responding to a pre-approval request from a real estate partner website.

Share Lender Comments

Share Lender Comments

When you record comments of a contact with a contact, share them with the agent. The more information you share with agents, the more information they will share with you. This helps keep all parties in the loop and makes the process as efficient as possible. For more information, see Share Comments.

Welcome Email URL

Welcome Email URL

Include your full URL in a welcome email. Every contact receives an automatic welcome email with text that you can customize. If you have a secure online application, make sure to put the full web address (URL) in the **Application Link** text box on the My Account page of the Admin section. The following example shows the correct format for a full URL.

```
http://www.example.com/link/to/application
```

Your link might not include a subdomain (www) or a path (/link/to/application) like the example, but the protocol (http://) and domain (example.com) are required for a full URL, as follows.

```
http://example.com
```

Alerts - Lender

Alerts - Lender

When you set up alerts, the system notifies you when a contact requests a pre-approval and when an agent shares a comment with you. Alerts can help you provide timely service to a contact and ensure you are notified immediately of agent updates.

To Add Alerts

1. Make sure you are logged into the Market Leader **Admin** interface.
2. In the navigation list, click **Admin**.
3. In the Website view, click Alerts.
4. In the **Alerts** view. click **Add**.
5. In the **Add Alert**pop-up dialog, enter the Alert information.
    - To sign up for text message alerts, enter a cell phone number, and then select a cell phone carrier.
    - To sign up for email alerts, enter an email address.
6. Click **Add**.

   A test message, titled Alert Activation, will be sent to your phone or email address when you add the alert.
7. Check to make sure you receive the test alert. There may be a slight delay before your cell phone carrier sends the alert to your phone.

You can have any combination of text or email alerts, up to 3, set up at a given time.

To Stop Alerts

1. Make sure you are logged into the Market Leader **Admin** interface.
2. In the navigation list, click **Admin**.
3. In the Website view, click Alerts.
4. For a specific email address or cell phone number, click the Delete icon ( ).

Contacts - Lender

Contacts - Lender

The Contact Details section contains valuable information on each contact grouped by tabs: Summary and Listings.

- Under the Summary tab is information about the contact, including any reminders and comments specific to the contact.
- Under the Listing tab, you can view all the listings the contact has viewed on the website and any listings the contact has saved.

See Also

- Contact Listings

Contact Status - Lender

Contact Status - Lender

The contact view provides a list of contacts filtered by status type. By default, the contact list shows **New** contacts. On subsequent views, the system remembers the last status type selected. Lenders can assign a contact one of the following status types.

- New
- Retry
- Active
- Inactive
- Qualified
- Unqualified
- Hot
- Closed
- Trash

With the exception of Trash, changing a contact status does not delete, unsubscribe, or change contact information in any way.

The **Contacts** view includes two types of **Status** control, a **Status** control in the list header, and a **Status** control in each contact row. To filter the list, use the former. To change a contact status, use the latter.

View Contact by Status Type

1. Make sure you are logged into the Market Leader **Admin** interface.
2. In the navigation list, click **Contacts**.
3. In the **Contacts** view, select a **Status** type from the drop-down list in the table header.

   The system only displays contacts of the selected status type in the list.

Change a Contact Status

1. Make sure you are logged into the Market Leader **Admin** interface.
2. In the navigation list, click **Contacts**.
3. For a specific contact row, select a new status type from the drop-down list in the **Status** column of the table.

If the list filter status type is any value other than **All**, a contact disappears from the list when you change their individual status.

See Also

- Share Comments
- Contact Summary
- Summary Comments
- Finding and Adding Contacts

Built-in Status Type - Lender

Built-in Status Type - Lender

The Market Leader system includes the following built-in status types for use by lenders. You can change a contact status as often as you want. Keeping the contact status up to date helps you focus on contacts who need attention and who are more likely to become clients. Good use of status helps save time and prioritize tasks.

Status	Definition
New	All contacts that you have not yet contacted. After you have attempted to contact a contact, change the status to **Retry** or **Active** depending on the response.
Retry	Any contacts that you need to proactively contact and monitor.
Active	These contacts are engaging with you but may not be ready to buy right now. This list generally includes people who are contacting you with questions by email.
Inactive	Contacts who haven't contacted you recently. In the **Recent Site Activity** view, you can see if any of the Inactive contacts come back to the site. If they do, change their status to **Retry**.
Hot	Contacts who are working with you for a pre-approval.
Qualified	Contacts you have determined are qualified for lending.
Unqualified	Contacts you have determined are unqualified for lending.
Closed	Customers who have closed on their home.
Trash	Contacts who have asked to stop receiving email, unsubscribed themselves, or have no valid email address. Use this status very rarely or not at all.

Custom Status Type - Lender

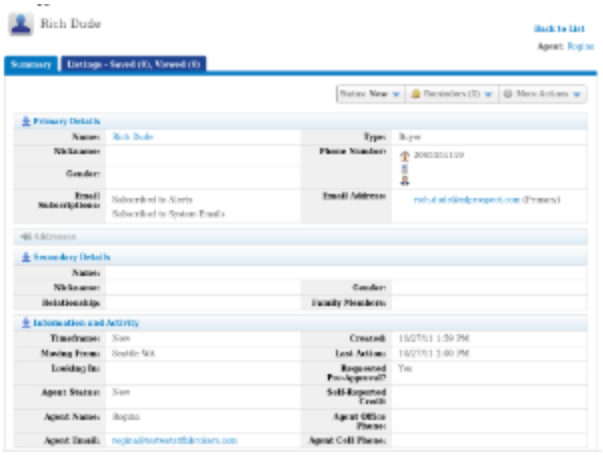
Custom Status Type - Lender

Market Leader does not support integration of custom status types with built-in status types. However, if you prefer to use a different method of keeping organized, you can create standard comments for a contact in the comments section of a Contact Summary view. To find all the contacts of a certain classification, use Find Contacts to search for contacts based on comments you entered. In effect, this lets you make unlimited contact groups of your own design. For more information on a custom status type workaround, see Custom Status Type - Agent.

Contact Summary - Lender

Contact Summary - Lender

When you click the name of a contact anywhere in the Market Leader **Admin** interface, they system displays the contact **Summary**. The **Summary** view contains detailed information about a contact. The following graphic shows an example of a contact summary. To enlarge the image, click the thumbnail.



View Contact Summary

1. Make sure you are logged into the Market Leader **Admin** interface.
2. In the navigation list, click **Contacts**.
3. To locate a contact, use the contact list or the **Find Contact** feature.

   To use the list, set the list filter, scroll, and use display controls to find a contact. To use the **Find Contact** feature, enter a name in the text box and click the **Find Contact** button.

4. In the **Contacts** list view, click a contact name.

   The system opens a **Summary** view of the contact.

Summary Description - Lender

Summary Description - Lender

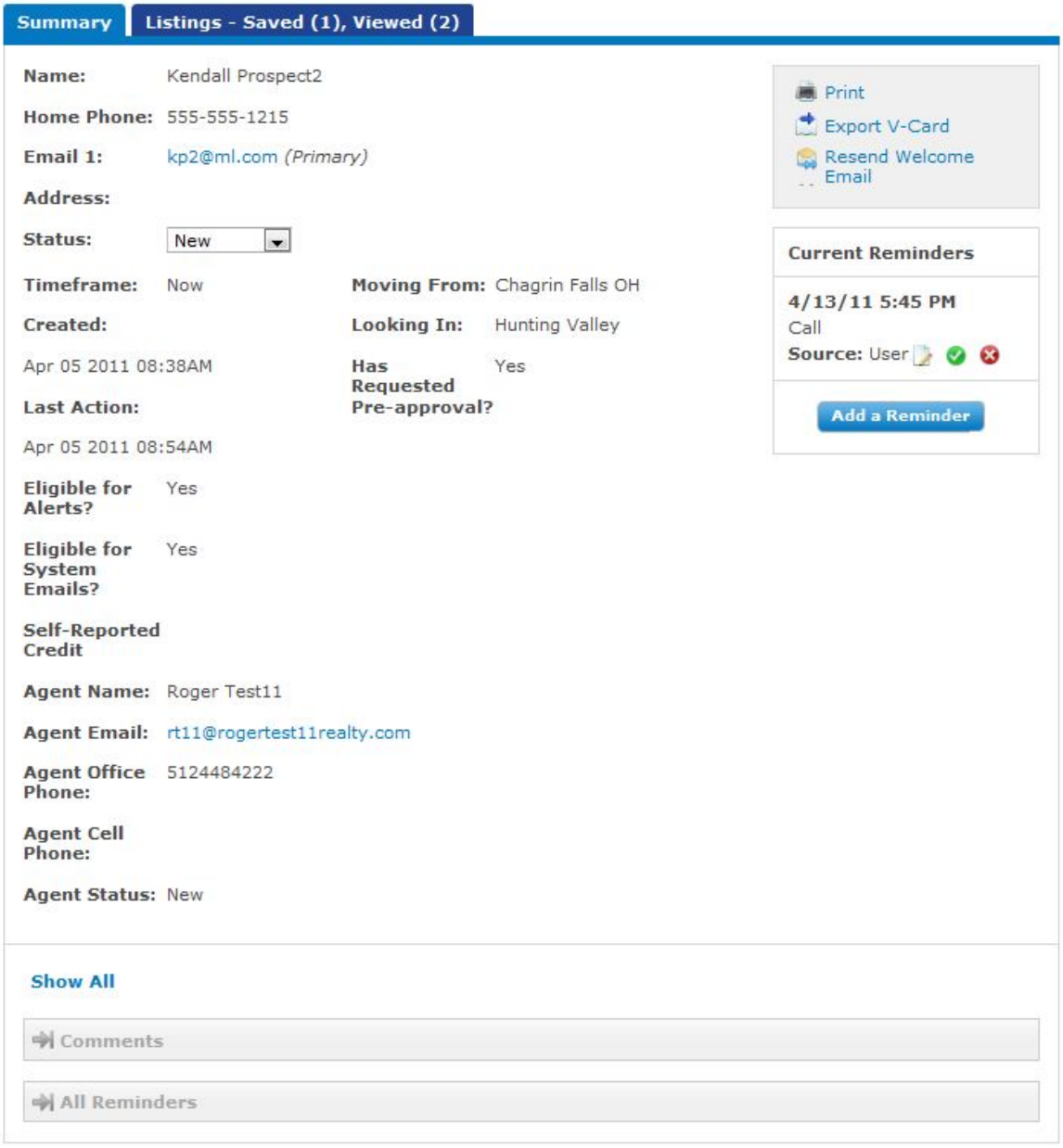
Feature	Description
Contact name	The view shows the contact name at the top of the page.
Snapshot	Based on the searches that this contact has performed on your site, the system creates a simple statement of what the contact is looking for, including the location, average price, and number of bedrooms and bathrooms. The statement appears above the tabs.
Current Reminders	You can see a few current reminders, act on them, or easily add a new reminder. To see all reminders, at the bottom of the page, click **All Reminders**. To manage reminders, use the **Edit Reminder**, **Complete**, or **Delete** icons.
Contact information	At the top of the Summary view, you can find the information you need to reach the contact, including phone numbers, email addresses, and a physical address.
Status	The **Status** indicates where a contact is in the lending process. To change the status of a contact, click the down-down list, and select a status. For more information on status types, see Contact Status - Lender.
Timeframe	On a registration form, contacts indicate how soon they expect to buy: **Now**, **1-3 months**, **3-6 months**, **6+months**, or **Just looking**.
Created	This is the date the contact signed up on the website.
Last Action	This is the most recent date and time the contact visited your site.
Moving From	This is where the contact is from, not necessarily where the contact is looking for property. This comes from information provided on a registration form.

Looking In	This is where the contact is looking for property. The system calculates this based on contact search behavior.
Has Requested Pre-approval?	If a contact selects that they need a mortgage pre-approval when they sign up, this is **Yes**.
Eligible for Alerts?	If a contact unsubscribes from listing alerts, this is No.
Eligible for System Emails	If a contact unsubscribes from system emails, this is No.
Self-Reported Credit	A contact an provide their own assessment of their credit. They entered this when they registered on the website.
Agent Name	The name of the agent to whom a contact is assigned.
Agent Email	The email of the agent to whom a contact is assigned.
Agent Office Phone	The office phone of the agent to whom a contact is assigned.
Agent Cell Phone	The cell phone of the agent to whom a contact is assigned.
Agent Status	An agent assessment of a contact buying status

Summary Actions - Lender

Summary Actions - Lender

The **Summary** view contains numerous calls to action. The following graphic contains active links to explanations for a given call. The actions table provides an explanation for each action call.



Actions Table

The following table describes actions that a lender can take using active controls in the **Summary** view.

Action	Description
Email Contact	Click the email address to open the Compose Message form.
Status	Use the **Status** drop-down list to change a contact status.
Print	To print the contact contact information, click **Print**.
Export V-Card	To export the contact contact information as a V-Card, click Export V-Card. The Export V-Card action saves the v-card file in your browser download folder. Most browsers have a Downloads menu command that provides a shortcut to downloaded files.

Resend Welcome Email	When contacts request a pre-approval, they receive a Welcome Email. Use this control to resend the email.
Edit Reminder	To change the date, time, or text of a reminder, click this.
Complete Reminder	To mark a reminder as complete, click this. This system prompts you to confirm the action.
Delete Reminder	To delete a reminder, click this. The system prompts you to confirm the action.
Add Reminder	Click this to open the Add a Reminder dialog.
Agent Email	To send an email to the agent of a contact, click the email address. This opens a new message window for the default email client on your machine.
Show All	Expands the **Comments** and **All Reminders** panels. Clicking any of these titles toggles between the expanded and collapsed display of the respective panel.
Comments	To see all comments that you have written about a contact, or to add comments, click on the **Comments** panel. You and an agent can share comments by checking the share comments box. See also Summary Comments.
All Reminders	To see all reminders set for a contact, click this panel.

Contact Listings - Lender

Contact Listings - Lender

The contact **Listings**view enables you to track listings that a contact has viewed or saved. The lists are sorted by date. The system grays out listings ( ) that are no longer on the market. For more information on Listings, see Contact Listings. Market Leader provides access to this page so you can have insight into what type of properties interest a contact and how serious a contact is.

View Listings

1. Make sure you are logged into the Market Leader **Admin** interface.
2. In the navigation list, click **Contacts**.
3. In **Contacts** view, click a contact name.

   The system opens a Contact Summary.
4. In **Summary** view, click **Listings**.

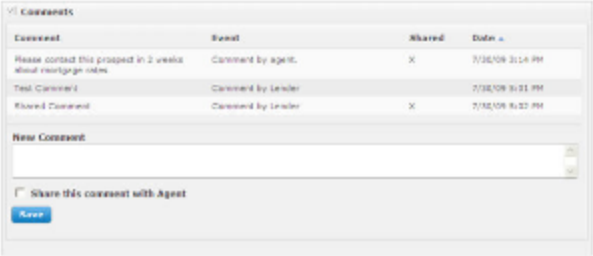
   The system displays **Saved** and **Viewed** listings.
5. To see details of a listing, click an MLS#.

Viewed and **Saved** listings tell you about contact interests and enable you to better help a contact. Internet contacts often hide behind anonymity, but the listing information helps you gauge their interests and market to them. The **Viewed** and **Saved** listings can help you judge how seriously a contact is looking for a home. Are the searches constrained and consistent or random and illogical?

Share Comments

Share Comments

As mentioned previously in Best Practices - Lender, when you share comments, you increase effectiveness of the team of people working with a contact. In a Contact Summary, you can view previous comments and add new comments. When you add a new comment, you have an opportunity to share a comment with an associated agent. You can use comments to record miscellaneous contact information or out-of-channel (i.e. non-Market Leader) messages. You can enter notes on phone calls or copy and paste emails sent from an email address not associated with a contact. An agent is able to see a shared comment when he or she reviews contact comments. An agent can also share comments with you. The following graphic shows a **Comments** panel with the list of previous comments, a **New Comment** text box, a **Share this comment with Agent** check box, and a **Save** button. To enlarge the image, click the thumbnail.



Share Comments with an Agent

1. Make sure you are logged into the Market Leader **Admin** interface.
2. In the navigation list, click **Contacts**.
3. In **Summary** view, if necessary, scroll to view **Comments**.
4. In **New Comment**, type a comment.
5. Check **Share this comment with Agent**.
6. Click **Save**.

See Also

- Contacts - Lender
- Contact Summary
- Summary Comments

Reminders - Lender

Reminders - Lender

The Market Leader system displays a **My Reminders** view when a lender logs into the **Admin** interface. **My Reminders** provides the following features.

- Sort reminder list by **Due Date**.
- Filter reminder list by reminder type, All, User, or System.
- Filter reminder list by reminder due date, All past, All future, Last month, Next month, This month, Last 7 days, or Next 7 days.
- If you associate a reminder with a contact, the reminder is linked to a Contact Summary via contact name.
- **Add a Reminder**.

My Reminders provides the following benefits.

- Keep reminder tasks prioritized by filtering and sorting.
- Quick access to a contacts detailed information by clicking a contact name.
- Flexibility to manage reminder tasks (i.e. edit, mark complete, or delete).

Add a Reminder

1. Make sure you are logged into the Market Leader **Admin** interface.
2. In **My Reminders**, click Add a Reminder.
3. In the **Add a Reminder** dialog, enter required information.

   Required fields are marked with an asterisk.

4. To associate a reminder with a contact, start typing a name.

   The system supports auto-completion and suggests names that match the first few characters you type.

5. Click a suggested name, or tab to select a highlighted name.

   You can move the highlight by using the arrow keys.

6. Click **Save**.

See Also

- Reminders

Admin - Lender

Admin - Lender

Market Leader provides **Admin** tools to manage the following information for a lender in the system.

- Profile Details
- Alerts
- Email Signature
- Welcome Email

A lender account includes only a small subset of the functionality that an agent account includes. For the most part, you use lender **Admin** features the same as described previously for agents and brokers. For more information, see Admin. There, you can find descriptions for these features with the following exceptions.

Profile Details

When viewing the Settings topic, keep in mind the following differences.

- The lender **Profile Details** view includes a field for **Company Name**. The lender **Company Name** appears on the **Finance** page of the consumer website as a financing entity associated with the broker, as in "Financing by *ABC Lending*," where *ABC Lending* is the company name.
- The lender **Profile Details** view includes a field for **Application Link**. This link represents an online portal for a contact to advance the pre-approval process (e.g. an online application form). The **Welcome Email** includes this link.

Welcome Email

The **Admin Email** view provides a **Welcome Email** feature which enables you to compose a custom message that the system sends automatically to contacts, when they request a pre-approval. Furthermore, the **Welcome Email** includes the **Application Link** that you configure in **Profile Details**. **Welcome Email** is unique to lender accounts. Agent and Broker accounts include multiple customizable email templates. For more information, see Message Templates.

See Also

- Admin

Icons

Icons

Icon	Definition	Primary Location
	Listing Photo	Manage Listings
	Listing Unavailable	Manage Listings
	Export V-card	Contact Summary
	Send / sent to Lender	Contact Summary
	Transfer Contact	Contact Summary
	System Emails Enabled	Contact Summary
	System Emails Disabled	Contact Summary
	Print	Contact Summary

	Recent Activity	Contact View
	Contact Unsubscribed	Contact View
	Mortgage Preapproval Request	Contact View
	Bad Email Address	Contact View
	Email Contact	Contact View
	Listing Alerts Enabled	Contact View
	Contact RSS feed	Contact View
	Phone Number Available	Contact View
	House For Sale	Contact View
	File Message	My Inbox
	Complete	Reminders
	Incomplete	Reminders
	Edit	Reminders
	Edit Disabled	Reminders
	New Comment	Call Center
	New Comment and Immediate Follow-up Request	Call Center
	Information	Multiple Views
	Delete	Multiple Views
	Remove item	Multiple Views
	Add item	Multiple Views

	School Report	Listing Details
	Good Performance	Performance Evaluator
	Average Performance	Performance Evaluator
	Poor Performance	Performance Evaluator

Training and Support

Training and Support

Market Leader offers the following resources to help get you started with its products.

- FAQ
- Training

In addition, when you are logged into the Market Leader **Admin** interface, you can access the Market Leader Support Knowledgebase.

To Access Support Knowledgebase

1. Click **Help and Support**.
2. Select **Get Support**.

   The system opens a new browser window or tab to the Market Leader Support Home page.

3. On the Support Home page, click **Knowledgebase**.

   You can browser categories and search for articles.

To Access Market Leader Online Help

In case you accessed this page from a browser bookmark or history, the following procedure describes how to access context-sensitive help for any view in the Market Leader **Admin** interface. This assumes you are already logged into the **Admin** interface.

1. Click **Help and Support**.
2. Select **Help for this page**.

   The system opens a new browser window or tab to the Market Leader online help content related to your current view. If no specific content is available, the system directs you to the Introduction.

FAQ

FAQ

How to post on Craigslist

How to add communities served

What to do when the company name changes

How to use site Activity

How to edit listing alerts

How to use the ICW

How to send recommended listings

How to 'tell us what you think" with the User Voice link

How to setup Outlook/iPhone/Android/Blackberry

How to add and manage listings

How to add areas to a listing search

How to see email history

How to find the source of your contact

Training

Training

Market Leader provides training resources for the following products.

Business Suite

- Training
- Quick Start Guide

Professional

- Training
- Quick Start Guide

Essentials

- Training
- Quick Start Guide